

What are the right skills?

**An investigation of an organisation's journey towards becoming
a learning organisation, and the skills that help leaders to
create the conditions and structures characteristic of a learning
organisation**

Thesis submitted for the degree of

Doctor of Social Science

at the University of Leicester

School of Management

by

Yves P. Givel

October 2014

What are the right skills?

An investigation of an organisation's journey towards becoming a learning organisation, and the skills that help leaders to create the conditions and structures characteristic of a learning organisation

by Yves P. Givel

The concepts of organisational learning and the learning organisation have been discussed and debated extensively in the literature, with some writers arguing that many organisations are not relying on continuous learning and development, and react with different strategies to external change, and with others defending the point of view that organisational learning or becoming a learning organisation is key to keeping up with the changes happening in the world, such as globalisation, increased competition and rapid technological advances. This study addresses the above concepts within the context of the hospitality industry, in particular the international hotel industry, and aims to provide some measures and clarity to the question of what the right skills are that help leaders creating the conditions and structures characteristic of a learning organisation, as well as to address the potential gap in the literature around the limited availability of research about the learning organisation and organisational learning in the hospitality industry. The research follows a two-phase case study design, using an organisation in the international hotel industry that had recently introduced a 'design-thinking' programme, the vehicle through which learning organisation reforms were introduced into the case study organisation with the stated objective to foster innovation and to differentiate the organisation from its competitors, as a research setting. The findings of this study suggest that organisations in the hospitality industry embarking on this journey of becoming a learning organisation should consider the leadership skills and mind-sets as identified in this research for the design of their leadership models, such as the ability to encourage experimentation, reward and foster failure and demonstrating a commitment to learning. This will assist them in the creation of a learning-supportive culture where employees are involved and participate, are empowered to make their own decisions and have trust in leadership to take risks and foster innovation. The study contributes to foster a better understanding by practitioners of the interaction between leadership skills and organisational learning, thus highlighting the importance of those skills and mind-sets in the creation of a learning organisation, and also reveals some interesting findings around the value and applicability of the learning organisation concept in the hotel industry.

Acknowledgements

I would like to extend my most personal thanks to the following for their contribution to the writing of this thesis:

Dan Bishop, my thesis supervisor, for his invaluable academic and moral support over the whole thesis period. His professional, detailed and always thought-provoking feedback was highly appreciated, and assisted me a lot in writing my thesis.

All the participants of the case study organisation, for bearing with me through the interviews and focus groups. Their qualitative input into what makes leaders successful in an aspiring learning organisation was invaluable, and provided a lot of colour to this research study.

The CEO of the case study organisation for letting me use 'his' organisation as a research setting; and the case study organisation's Chief Innovation Officer for ultimately inspiring me to choose this interesting theme for my thesis.

And finally, the biggest thanks go to my wife Karen, who was probably my greatest supporter over the past 5 years to achieve this milestone! Karen, I could never have done this without you! I hope it was worth it ... and you will be proud of me!

Thank you!

Table of Contents

Chapter 1: Introduction	9
TRACING THE KEY CONCEPTS: ORGANISATIONAL LEARNING AND THE LEARNING ORGANISATION	12
STUDY AIMS AND STRUCTURE	13
Chapter 2: Literature Review	15
INTRODUCTION	15
ORGANISATIONAL LEARNING AND THE LEARNING ORGANISATION	17
<i>Origins and Background</i>	17
<i>Organisational Learning</i>	19
<i>The Learning Organisation</i>	22
<i>Two sides of the same coin</i>	30
<i>Critiques of the learning organisation</i>	32
<i>Measuring organisational learning and the learning organisation</i>	38
<i>The learning organisation in the hospitality industry</i>	40
LEADERSHIP IN THE LEARNING ORGANISATION	46
<i>Introduction</i>	46
<i>Managers and Leaders</i>	47
<i>Leadership roles</i>	49
<i>Leadership skills</i>	52
<i>Leadership styles</i>	56
<i>Leadership mind-sets</i>	59
<i>Contingent view of leadership</i>	60
CONCLUSION	63
Chapter 3: Methodology	69
INTRODUCTION	69
RESEARCH STRATEGY	69
PHILOSOPHICAL PERSPECTIVE	70
METHOD AND DESIGN	71
SETTING AND PARTICIPANTS	74
<i>The Case Study Organisation</i>	74
<i>Participants</i>	77
INSTRUMENTS AND DATA COLLECTION	81
PILOT STUDY	85
PROCESSING AND ANALYSING DATA	86
<i>Survey and document analysis</i>	86
<i>Interviews and Focus Groups</i>	89
ETHICAL CONSIDERATIONS	92
LIMITATIONS	95

Chapter 4: Results and Discussion	97
INTRODUCTION	97
<i>Design-thinking</i>	97
RESULTS OF PHASE 1	101
<i>The Dimensions of the Learning Organisation Questionnaire</i>	101
<i>Document Analysis</i>	104
FINDINGS OF PHASE 2	107
<i>The case study organisation</i>	107
<i>The impact of leaders</i>	119
PUTTING THE RESULTS AND FINDINGS INTO CONTEXT	142
Chapter 5: Conclusion.....	144
INTRODUCTION	144
ANSWERING THE RESEARCH QUESTIONS	148
<i>Barriers</i>	148
<i>Impact of Leaders</i>	151
<i>Hospitality and Hotel Industry</i>	154
OVERALL RESEARCH CONCLUSION	157
IMPLICATIONS FOR THEORY	160
IMPLICATIONS FOR PRACTICE.....	162
LIMITATIONS.....	165
IMPLICATIONS FOR FURTHER RESEARCH	167
Appendices.....	170
Bibliography	171

List of Tables

Table 1 – Drivers cited as contributing to the emergence of the learning organisation .	17
Table 2 – Organisational learning and the learning organisation	30
Table 3 – Difficulties and critiques of the learning organisation	37
Table 4 – Proposed ‘Roles’ of leaders in learning organisations	52
Table 5 – Proposed ‘Skills’ of leaders in learning organisations	56
Table 6 – Proposed ‘Styles’ of leaders in learning organisations.....	58
Table 7 - Framework.....	72
Table 8 – DLOQ survey participation	79
Table 9 - Individual Interview Participants	84
Table 10 - Focus Group Participants	85
Table 11 – The Dimensions of a Learning Organization.....	87
Table 12 – Performance Outcomes.....	87
Table 13 – Overarching Structure (a-priori themes).....	89
Table 14 – Detailed Themes	91
Table 15 - DLOQ Results	102
Table 16 - Barriers and challenges	108
Table 17 - Overcoming barriers.....	115
Table 18 - Relevancy of learning organisation concept	118
Table 19 - Leadership skills.....	120
Table 20 - Unfavourable leadership qualities	134
Table 21 - Impact of wider organisational or environmental factors	138
Table 22 - Barriers and challenges	148
Table 23 – Leadership skills conducive to the creation of a learning organisation.....	152
Table 24 – Leadership Roles, Skills, Styles and Mind-sets.....	152
Table 25 – Example: Leadership Model.....	163

List of Figures

Figure 1 – Managers and Leaders	48
Figure 2 – The Design-thinking process	76
Figure 3 - Design-thinking elements	98
Figure 4 - Survey Result Graph	101
Figure 5 - DLOQ Results Graph by group	103

Appendices

Appendix 1: Measuring Organisational Learning and the Learning Organisation

Appendix 2: Leadership in Learning Organisations

Appendix 3: Blank copy of DLOQ used

Appendix 4: Invitation Letter

Appendix 5: Interview Guides (Focus Group and Individual)

Appendix 6: Coding Summary by Node Extract (Excel)

Appendix 7: Informed Consent Form (blank)

Appendix 8: Communication by CEO

Appendix 9: Leadership Expectations

Appendix 10: Performance Model

Appendix 11: Innovation projects

Appendix 12: Tenure (extract from CSR Report)

Appendix 13: Source Classification Sheet

Appendix 14: sample Leadership Profile

Chapter 1: Introduction

The world is changing, and so is the hotel industry. In this new world, customers are better educated and have more power than ever before: they have a number of tools and options available to consult online before making a purchase, or book a room in a hotel. Traditional services are being replaced by new ones that are fuelled by the constant change of customer expectations: *Zipcar* replacing rental cars, or *Uber*¹ replacing traditional taxi services. Similar examples can be found in the hospitality industry, with *Airbnb*² potentially replacing traditional hotels, and *Tripadvisor* replacing the conventional printed Michelin Guide.

Technology has had an enormous impact upon the hotel industry, changing the way business is conducted, such as the use of online booking engines (Davidson et al. 2011). Large international hotel companies are bringing a broad range of innovation to the customer experience— from mobile check-in to space design to the hotel room of the future. Airbnb has surpassed well-known large international hotel companies as one the world's largest hotel chains, without owning a single hotel. Online agencies and services are changing the travel landscape; partnering with them is the new price of admission. With sites such as TripAdvisor and Orbitz, many guests no longer come to the hotels, but the hotels have to go to them.

The point being made is that in today's world of globalisation and rapid, continuous change in technology, some organisations might have to re-think the way they operate and manage their business. This reflects a significant theme in the academic literature, which posits that organisations may continue to successfully compete on the basis of a stable, low-cost, high-volume strategy, but if nations and organisations wish to avoid a 'race to the bottom' where salaries and working conditions are continuously eroded, then they should look at developing the capability to continuously innovate, reorganise, learn from experience, create and offer new services and products, and improve the way those are delivered to their customers (Phillips, Watkins and Marsick 1996).

¹ A ridesharing service, which operates in multiple international cities around the world.

² An on-line community marketplace for people that want to rent out rooms in their accommodation.

² An on-line community marketplace for people that want to rent out rooms in their accommodation.

The above noted challenges around globalisation, increased competition, technological advances and the ever accelerating rate of change overall, were also viewed as the drivers for the emergence of concepts such as the ‘learning organisation’ and ‘organisational learning’, based on the premise of helping organisations to address those challenges and making them more adaptable to change. Being a major strategic change initiative, organisations embarking on the journey of becoming a learning organisation also realised the impact that leaders have on the success or failure of the concept. Identifying the best approach to creating a learning organisation, and the critical skills needed by leaders to support such a strategy, has been subject of the vast literature about the learning organisation. With different writers presenting different frameworks, with different definitions of the concept, and different views on the impact of leadership, this literature seems to have an overly unitarist perspective on how to create a learning organisation, and what leadership skills are needed to create the conditions and structures characteristic of a learning organisation. This view may neglect wider organisational factors that are at play that can potentially influence how an organisation embarks on the journey of becoming a learning organisation, and what kind of leadership skills should be valued, acquired and developed to support this strategy.

Although many organisations are not relying on continuous learning and development, and react with different strategies to external change (e.g. Ashton and Green 1996, Keep 2000, Keep and Rainbird 2000), proponents of alternative competitive approaches point out that other organisations choosing the learning approach will have to ensure that the knowledge and skills of their employees are optimally used and deployed, and must go beyond simply ensuring that individuals are trained and developed, focusing on shifting towards collective and continuous learning. Senge (2006) calls these organisations ‘learning organisations’:

‘...where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.’ (Senge 2006: 3)

The learning organisation is a word often misused by many practitioners who believe that the concept merely addresses an increase in learning opportunities and training for individuals in an organisation. But the learning organisation, if not only used as a ‘buzz

word', is much more than just offering additional individual learning opportunities – it is about removing barriers to the organisation's ability to adapt, thus representing a shift towards organisational and collective learning (Garavan 1997). For those interested in how one might move an organisation towards the learning organisation model, this raises the question of what skills, knowledge and abilities could assist leaders³ in removing those barriers to learning, and in building a learning organisation? And how does the organisational environment affect the utility and employment of those skills? How does the rhetoric of the learning organisation compare with what is happening in organisations today? It is questions such as these that occupy this study.

In line with the above argument that the learning organisation literature often adopts a more 'unitarist' perspective towards the concept, Bass (2000) takes the view that only transformational leaders can be successful in building and maintaining learning organisations. The same argument is presented by Senge (1990), talking about the 'leader's new work' to build learning organisations, addressing the roles, skills and tools necessary to be successful. Both views tend to neglect wider organisational, political, cultural or environmental factors that might be at play, and argue that only one sort of leadership, and one set of skills, is needed.

³ The term 'leader' in the context of this research is defined later in the Literature Review chapter.

Tracing the Key Concepts: Organisational Learning and the Learning Organisation

Argyris and Schön (1978) proposed the idea that organisations had different levels of learning namely single-loop and double-loop learning (Easterby-Smith *et al.* 1999), and the overall idea of organisational learning. Organisational learning continued to appeal to researchers during the early 1990s and the writings started to fall into two different perspectives: the organisational learning perspective advocated by the academics, which was more descriptive addressing the perception of the learning processes in organisations, and the learning organisation perspective advocated predominantly by practitioners, which was more prescriptive, pragmatic and geared towards the creation of models that helped organisations to transform themselves (Rebelo and Gomes 2008). Subsequently, the concept of the learning organisation has evolved from and has been influenced by a variety of movements, such as the organisational development movement in the 1970s and total quality and business reengineering in the 1980s, as well as other events such as more recent shifts towards globalisation, market deregulation and the knowledge society (Pedler *et al.* 1997, Jamali and Sidani 2008). The above-mentioned concepts of the 1980s were perceived as too efficiency-driven, and the learning organisation became a well welcomed change focusing more on development and growth rather than cost cutting – an approach that left many organisations vulnerable in times of crisis (Garavan 1997), with few bench-strengths in their succession planning, and no strategy in place on how to foster innovation and learning to overcome the economic down-turn. Senge (2006) also argued that some of these older initiatives were not able to cope with the pace of change, and organisations needed to become learning organisations to move forward with time. Peter Senge's (2006) work was probably one of the most influential writings on the learning organisation, at least from a US perspective. But even with his seminal work, the concept remained ambiguous and research up to today in general is still characterised by abstraction and vagueness (Ortenblad 2001).

Study Aims and Structure

The overarching research aim of this study is the investigation of an organisation's journey towards becoming a learning organisation, and the skills that help leaders to create the conditions and structures characteristic of a learning organisation. The Learning Organisation literature adopts a more unitarist view of what kind of leaders are needed and what leadership skills are successful, but with limited consensus between writings and with little research available on how leadership skills may differ depending on the wider organisational context in an attempting learning organisation (e.g. Garavan 1997). The contribution of this research is helpful for practitioners to get a better understanding of the interaction between leadership skills and organisational learning, highlighting the importance of those skills in the creation of a learning organisation.

Chapter 2 (Literature Review) is structured in two main parts, concluding with a number of more refined research questions in line with the above stated overarching research aim. The first part looks in particular at the literature around organisational learning and the learning organisation, reviewing the various drivers and origins of the concepts, the main writings, the various critiques, the measurement tools, and the applicability of the learning organisation concept in the hospitality industry. The second part reviews what the organisational learning and learning organisation literature writes about leadership, with an emphasis on different skills, roles, styles and mind-sets of leaders.

Chapter 3 (Methodology) starts with the overall research strategy that has been applied for this study, followed by the philosophical perspective adopted and the methods used. Based on philosophical/epistemological, substantive as well as practical concerns, and to address the research questions, the research design chosen is a two-phase, embedded single-case study. The first more quantitative-dominated phase started with a survey questionnaire and document analysis with the purpose to establish whether the case study organisation was indeed an organisation on a journey of becoming a learning organisation, and whether it could therefore be considered for researching the skills needed by leaders to create the conditions and structures characteristic of a learning organisation. The second more qualitative phase included structured interviews and focus groups based on the critical incident technique (Flanagan 1954) with the purpose of actually researching those leadership skills and gather rich qualitative data to answer

the research questions. Each phase of this design was separate from the other, and took place in sequence. The chapter also gives additional information on the research setting, the case study organisation, as well as on the sample procedure and research participants. The subsequent parts of the methodology chapter then outline the data collection process and instruments used, and give additional details how the collected data was structured and analysed. The chapter ends with some considerations in regards to ethical considerations, importance and potential limitations of the study.

Chapter 4 (Results and Discussion) is split into two main parts, with the first part looking at the results of the first, more quantitative-dominated research phase that aims at confirming the case study organisation as a relevant research ground for this study, followed in part two by the findings and discussions of the second, more qualitative research phase. The second part is then again split into two main sections, starting with the findings, addressing the learning organisation concept in the case study organisation in particular, followed by the second section that presented the findings and discussions around the impact of leaders on organisational learning and the potential creation of a learning organisation.

Chapter 5 (Conclusion) puts the research findings into context with the literature reviewed, and attempts to answer the various research questions as well as to address the overarching research aim, which is the investigation of an organisation's journey towards becoming a learning organisation, and the skills that help leaders to create the conditions and structures characteristic of a learning organisation. The study's implications for theory and practice are also discussed, followed by the potential limitations and considerations for future research.

Chapter 2: Literature Review

Introduction

A short history of organisational learning and the learning organisation, as well as the various drivers that are commonly cited as being the reason of the emergence of these concepts, will be taken as an appropriate starting point in this chapter. The key issues driving research and writing on these topics have remained fairly consistent over the past three decades, and remain significant in today's social, business and political environment: the often-stated need for organisations to be able to adapt to the ever-changing turbulent economic environment in times of globalisation (e.g. Eijkman 2011). From there, the question of whether 'organisational learning' and the 'learning organisation' are the same, are different, or are complementary, is addressed by reviewing a number of relevant writings. As these two terminologies will often be used interchangeably during the literature review, it is important to understand how they relate to each other. A pragmatic explanation was given by Nyhan *et al.* (2004), arguing that the two terminologies represent two sides of the same coin. They describe 'organisational learning' as the process to achieve the goal of becoming a learning organisation, and describe the 'learning organisation' as a goal to be achieved, which will involve organisational learning.

When conducting a literature review on the concepts of organisational learning and the learning organisation, one inevitably comes across a fairly narrow band of main writers who are commonly referenced, such as Senge (2006), Pedler *et al.* (1997), Argyris and Schön (1978) and Watkins and Marsick (1993). The literature review will look at a number of different definitions of the learning organisation in particular, and will then examine the work of the above writers in more detail to form a common understanding of the main ideas around organisational learning and the learning organisation. Also included in this first part of the literature review are the various critiques of organisational learning and the learning organisation, as well as how different writers have attempted to measure either the process of organisational learning, or the status of a learning organisation. The section closes with a review of the above-mentioned concepts particularly in the hospitality industry.

The second main theme of the review revolves around leadership, especially leadership in the context of organisational learning and the learning organisation. With the leadership literature being very rich and voluminous, the literature review concentrates on writings around organisational learning and the learning organisation that specifically addressed the role of leaders and their respective leadership skills. The various writings are then categorised according to the way leadership was described: roles, skills, styles, and attitudes. From there, the literature is also examined around the theme of 'contingent' leadership, which addresses the questions concerning whether leadership would look the same for everybody in any context or not, and whether the writings have addressed leadership mainly on top level only or on all levels across the organisation.

Organisational Learning and the Learning Organisation

Origins and Background

A number of factors have been cited as prompting the emergence of the concept of the learning organisation, and some general themes can be elicited from the literature (see Table 1). There seems to be consensus that interest in the learning organisation concept was fuelled by a globalising economy, which brought along increased competition, as well as by the turbulent economic environment, characterised by constant change and an exponential speed of technological advances. Maintaining a competitive advantage under those circumstances meant being able to adapt quickly and having a foundational commitment to continuous learning (Gould 2000).

Key words	Drivers	Writers
Globalisation	Global economy, firms going global, increase in mergers and acquisitions	Harrim (2010), Chinowsky <i>et al.</i> (2007), Rebelo and Gomes (2008), Gould (2000)
Change	Turbulent change, turbulent environment, rapidly changing environment, increased speed of change	Song <i>et al.</i> (2009), De Geus (1988), Harrim (2010), Appelbaum and Gallagher (2000), Gould (2000), Drucker (1988)
Competition and Customers	Increased competition, companies need to evolve to stay ahead	Song <i>et al.</i> (2009), Harrim (2010), Chinowsky <i>et al.</i> (2007)
Technology	Exponential technological advances	Song <i>et al.</i> (2009), Park (2008), Drucker (1988)
Workforce: Fluid Labour Market	A more educated workforce, aging workforce	Chinowsky <i>et al.</i> (2007)
Knowledge	Knowledge-based economy, shift from manufacturing towards service industry, delivering knowledge-based solutions	Song <i>et al.</i> (2009), Appelbaum and Gallagher (2000), Drucker (1988)

Table 1 – Drivers cited as contributing to the emergence of the learning organisation

According to Fulcher (2000), globalisation is ‘... *the development of relatively distanceless relationships that extend beyond national units and involve a growing consciousness of the world as a whole*’ (Fulcher 2000: 525). Some writers advocate for

a ‘stronger’ globalisation thesis (e.g. Ohmae 1999), arguing that the world has become borderless and that we are seeing the increasing convergence of economic systems, forms of production, management and even culture. The opposing view would argue that globalisation is nothing new, with the nation states still playing a very important role in the world (e.g. Weiss 1999), and that we are in fact seeing an entrenched divergence. The middle position on the continuum represents a more moderate globalisation thesis, recognising a certain impact of globalisation but also emphasising the importance of the nation state (e.g. Fulcher 2000). Whether one favours the strong globalisation thesis or the weak one, there is a high degree of consensus that it is one of the drivers that has brought along a number of changes to the world of organisations and market competition, which in turn contributed to the development of the concept of the learning organisation.

Another trend cited by some was the shift from a predominantly manufacturing-focused economy towards a more knowledge-focused economy in much of the Western world, with a significant increase of ‘knowledge workers’ and a decrease of industrial labourers in many countries (e.g. Drucker 1988). Whether this shift to knowledge work, and the importance of knowledge workers, was overstated by Drucker (1988) is beyond the scope of this paper, but it presents an interesting perspective that contributed to the emergence of the concept. Another often-cited change factor is the improvement in communication technology and the overall advances in technological innovation, resulting in increased uncertainty and frequency of change in the business environment. The advances in communication and other information technology would support Drucker’s predicted changes to a certain degree, although not across all industries and organisations, with more qualified users who could transform their data to information to create further knowledge.

Another potential driver for organisational learning, referring to the process of creating structural and human capacity for adaptability within the organisation, and the learning organisation are changes in the workforce with the entrance of new generations, such as the Generation Y⁴, which according to some writers have very different expectations of

⁴ With Generation Y, this study refers to a demographic cohort also referred to as ‘Millennials’, made up of individuals born between 1982 and 2004 (Howe and Strauss 2000).

the workplace than previous generations had. There is said to be growing dissatisfaction for example with traditional management methods based on command and control, and more participative leadership is in demand (Harrim 2010).

With a large number of people planned to retire over the coming years, loss of organisational knowledge tops the agenda of many organisations, and also serves as a key driver for the establishment of a learning organisation (Chinowsky *et al.* 2007). This increased labour market fluidity and change has generated a need for organisations to be more adaptable, and the learning organisation concept addresses the process of giving organisational structures and employees the capacity to adapt in response to external change.

Although a number of successful organisations don't change and evolve on continuous basis, for many organisations remaining competitive in the new knowledge era requires delivering knowledge-based solutions to meet today's customer expectations. Many of them need to evolve continuously if they want to secure long-term, sustainable profitability and success, as keeping the status quo may not be enough anymore (Chinowsky *et al.* 2007).

Organisational Learning

Overview of the concept

In the academic literature, there is little agreement over a definition of organisational learning. The process of organisational learning is prominently based on writers such as Argyris and Schön (1978), who distinguish between single and double-loop learning (these terms are defined below). There is perhaps some consensus that organisations need to be able to learn if they want to remain competitive, but how those organisations actually should learn is debated. Fiol and Lyles (1985) introduce organisational learning as follows:

'... organizational learning is not simply the sum of each member's learning. Organizations, unlike individuals, develop and maintain learning systems that not only influence their immediate members, but are then transmitted to others by way of organization histories and norms.' (Fiol and Lyles 1985: 804)

Organisational learning therefore is seen as being the terminology used by academics primarily (Argyris and Schön 1996), and being descriptive in nature based on empirical research (Tsang 1997). It involves the process by which an organisation adapts and transforms in response to or anticipation of change (Sun 2003, Watkins and Marsick 1993, Nyhan *et al.* 2004, Ortenblad 2001). Huber (1991) for example, in describing the process of organisational learning, notes that '*... an entity learns if, through its processing of information, the range of its potential behaviours is changed... an organization learns if any of its units acquires knowledge that it recognizes as potentially useful to the organization*' (Huber 1991: 89). Addressing the question of how individual learning is transferred to the organisation, Kim (1993) argues that this is filtered through collective 'mental models'. Mental models, as proposed by Senge (2006), are deeply held internal images of how the world works, which impact on how an individual behaves, and on the way in which new information and knowledge is (or is not) integrated by members of a group or organisation. This is supported by Argyris and Schön (1978), who argue that organisational learning takes place through individuals whose actions are based on a set of shared models. Shared interpretation through mental models is the link between individual and organisational learning: '*Because the mental models in individuals' heads are where a vast majority of an organization's knowledge (both know-how and know-why) lies*' (Kim 1993: 44). Although theories of organisational learning are supported by a number of empirical studies, the descriptive writings on organisational learning often fail to provide useful and pragmatic guidelines to practitioners in organisations (Tsang 1997).

Chris Argyris and Donald Schön

The interest in the learning organisation started with Argyris and Schön's (1978) 'Organizational Learning' (Pedler *et al.* 1997), who described organisational learning in terms of the distinction between single and double-loop learning. Single-loop learning is the basic learning process, where learning occurs by solving a problem and by addressing the problem's symptom. Double-loop learning, which is more effective, occurs when addressing the root-cause of the problem, and not merely the symptoms to solve a problem. It is like taking an Aspirin for headache (single-loop) versus checking out one's eyesight, which could be the root-cause of the headache (double-loop). Collective learning, which is also central to the concept of the learning organisation, is not simply the sum of all individual learning, but addresses learning on individual,

group, and organisational and even inter-organisational level. It is considered by many writers to be a key competitive advantage of companies today.

Furthermore, Argyris and Schön (1978) recognise the notion of agency, arguing that organisational learning can take place when members of an organisation act as learning agents for the organisation. Their individual learning in turn will result in organisational learning (Garavan 1997).

‘There is something paradoxical here. Organizations are not merely collections of individuals, yet there are no organizations without such collections. Similarly, organizational learning is not merely individual learning, yet organizations learn only through the experience and actions of individuals. What, then, are we to make of organizational learning? What is an organization that learns?’
(Argyris and Schön, 1978: 9)

In attempting to answer this question, Argyris and Schön begin by observing that people have what they call ‘theories-in-use’, which are individuals’ own interpretations and mental maps guiding ones actions and behaviours in a number of situations. Most individuals are not explicitly aware of their mental maps or their theories-in-use, as they tend to be tacit structures. Argyris and Schön (1978) further argue that on the other hand, individuals also have ‘espoused theories’, which are the words used to convey what one does, or what one would like others to think they do. Simply said, espoused theories represent what someone says they would do in a certain situation, whereas the theories-in-use represent what they actually do – it therefore is rather the mental maps that guide individuals’ actions rather than their espoused theories. In many cases, there is inconsistency between an individual’s theory-in-use and espoused theory, and Argyris and Schön (1978) argue that effectiveness results from developing congruence between the two of them.

Argyris and Schön’s (1978) argument is that individual and collective learning are different aspects of the same process, with individual learning not only taking place within individuals but also collectively.

‘As individual members continually modify their maps and images of the organization, they also bring about changes in organizational theory-in-use’
(Argyris and Schön 1978: 17)

Individuals therefore become change agents in an organisation's theory-in-use. If there is a mismatch between organisational results and expectations, they can detect eventual errors in the organisation's theory-in-use and correct them. This is the basis onto which Argyris and Schön (1978) build their single-loop and double-loop learning theories, with the aim of resulting in higher level learning.

In the context of this study, fostering such higher levels of learning may have implications for leaders in learning organisations, and what kind of leadership skills will make leaders successful in creating the structures and processes characteristic of a learning organisation.

The Learning Organisation

Overview of the concept

A number of writers have taken up the theme of organisational learning, and attempted to create models that would link individual and organisational learning (e.g. Kim 1993). This created two main strands of research, where one continued to study the process of organisational learning, and the other ventured into more prescriptive accounts of the learning organisation, advocating how an organisation '*should*' learn to develop its capacities to adapt in the face of change (Tsang 1997). The learning organisation is seen by a number of writers as being the terminology used first and foremost (though not exclusively) by practitioners (Argyris and Schön 1996), and representing in general a goal or ideal form of an organisation (Nyhan *et al.* 2004, Ortenblad 2001, Watkins and Marsick 1993).

Some writers advocate that the concept of the learning organisation (e.g. as presented by Senge 1990) can be achieved as a final stage or goal of an organisation. Others argue that organisational learning is a process (e.g. as presented by Argyris and Schön 1978). Gorelick (2005) argues that the five disciplines put forward by Senge (2006) for example are tools and an integral part of the organisational learning process. If learning is to be a continuous cycle, then the final stage of declaring oneself a learning organisation is not possible. This is a critical point: the process is seen as continuous, as organisational learning itself consists of continuous transformation, and therefore no organisation should be able to proclaim that they have become a learning organisation as such (Nyhan *et al.* 2004):

'If an organisation behaving in a smug and self-confident manner, considers that it has achieved the goal of being a learning organisation, it has ceased to be a learning organisation. The advice of Schiller is to be heeded in this respect – "Follow the one who is searching for the truth but take no notice of the one who claims to have found it". A learning organisation, therefore, has to go through a continual process of becoming a learning organisation ...' Nyhan et al. (2004: 73)

Such a view echoes Drucker's (1990) vision of future forms of work, which emphasised a high skills / high quality model, arguing that competition in the future would be increasingly based on quality, and that higher value-added services and goods would represent the way developed countries would have to compete against lower-wage economies. This new organisational model for high skills / high quality has a number of implications, such as flatter non-hierarchical organisational structures, more autonomous work based on self-monitoring, and the requirement of workers to adapt to change, solve problems, take initiative and think creatively (Brown and Keep 2003). On the other hand, although many of Drucker's (1990) predictions may be accurate, there are a number of organisations who are very successful by following alternative strategies that do not rely on high levels of skill, as will be presented later in this review.

The literature on the learning organisation concept has emerged mainly from within business schools, driven by an interest in organisational development (Brown and Keep 2003). Therefore, most writings in this area tend to be rather prescriptive, and as noted by Tsang (1997), are often lacking the basis of systematic empirical research. The majority of writings present common characteristics of a learning organisation (Hughes 2000): a strategy of continuous organisational change, a link between individual development of employees and the resulting development of the organisation, and a new kind of workplace learning with a focus on replacing single-loop learning by double-loop (Argyris and Schön 1978), or adaptive learning by generative learning (Senge 2006). Although many writers in the learning organisation field address similar themes and features of the concept, the actual concept of the learning organisation is still subject to wide-ranging debates (Mumford 1995). Below follows an outline describing the models of the best-known writers in more detail.

Peter Senge

Senge (2006), a key ambassador of the concept of the learning organisation, argues that today's organisations should become places

'... where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.' (Senge 1990: 3)

Organisations in this sense do not simply adapt to changes imposed by the environment, but should have the capacity for generative learning, and have the ability to create alternative futures by fostering continuous learning and allowing experimentation (Watkins and Marsick 1996). He spells out how the ideal learning organisation should look, therefore representing a set of ideal organisational characteristics towards which organisations, practitioners in the field and consultants should aspire to.

Senge's (2006) approach to the concept of the learning organisation is built on five interrelated dimensions that he considers vital to build organisations that can truly learn, which he calls the *Five Disciplines*. Disciplines for him are development paths to great proficiency, and it is the convergence of these disciplines that create the learning organisation (Senge 1990: 10). *Personal Mastery* addresses the continuous clarification of personal vision, and a focus on developing patience and being realistic in one's outlook. It addresses the personal commitment to excellence and continuous learning. In line with Argyris and Schön's (1978) earlier work, *Mental Models* are described as deeply engrained ideas how the world works. For Senge, as with Argyris and Schön, the act of challenging existing mental models and assumptions, thus challenging the status quo, is a key feature of a learning organisation. *Building Shared Visions* aligns individual and organisational objectives by sharing a picture of the future. Shared visions inspire trust, and foster commitment by people, rather than compliance. *Team Learning* addresses the learning capabilities of a group and the creation of synergy. According to Senge, *'... unless teams can learn, the organisation cannot learn'* (Senge 1990: 10). As the final discipline, *Systems Thinking* is the focus on interconnectedness, and the ability to see that everything is interrelated and not everything consists of linear cause-effect chains. It emphasises the importance of seeing the whole rather than only

the sum of its parts, and for Senge (2006) represents the glue that holds all the other disciplines together.

Although Senge's concept of the learning organisation is seen by many as very appealing, and has been taken up by many organisations and consultants, it also has some flaws, for example in neglecting a number of internal variables, such as power relations and control within an organisation, as well as external variables that potentially impose barriers to learning (Yang, Watkins and Marsick 2004).

Senge's approach to the learning organisation seems to build on some of Argyris and Schön's (1978) ideas about organisational learning, mainly in the areas of challenging the status quo. As with the work of Argyris and Schön (1978), Senge's 'disciplines' of the learning organisation may impact the kind of leadership skills an aspiring learning organisation is looking for. For example, the dimension of 'Mental Models', and the ability as described above to challenge the status quo, will require a specific mind-set of leaders to do so on continuous basis and be successful in such an organisation.

Mike Pedler, John Burgoyne and Tom Boydell

Pedler, Burgoyne and Boydell (1997) have looked at the concept of the learning organisation from a more European perspective, and argue that there has been a shift within the field away from looking at the learning organisation as the 'panacea' for any organisational improvement, towards a more pragmatic emphasis on the process of organisational learning. A learning company, as they call it, in their view has not only the purpose of resolving immediate challenges and problems, but also of ensuring that learning takes place from the problem-solving process if they want to survive in today's competitive environment which is characterised by the need of organisations to be flexible, agile and intelligent. The learning company is described by Pedler *et al.* (1997) as a journey, with a number of maturity stages, based on eleven characteristics that need to be developed on the way. Those characteristics address not only soft processes such as culture and the learning climate, but also systems processes such as information technology, as well as social processes looking at structures, participation and communication.

To briefly explore each of these eleven characteristics: a *Learning Approach to Strategy* means that the organisation is constantly evaluating and if necessary revising its

strategy; *Participative Policy Making* allows all members to contribute and participate in the strategy process; *Informing* assists in making information available to everybody through information technology; *Formative Accounting and Control* is about creating transparency and a better understanding of how money works in the business and the organisation; *Internal Exchange* addresses the way people and departments are working across functions in the organisation and seeing themselves as customers and suppliers of each other; *Reward Flexibility* means providing the conditions and rewards for learning; *Enabling Structures* is about adaptability and flexibility in the organisational architecture; *Boundary Workers as Environmental Scanners* is about learning from the environment and welcoming information for learning from anybody in the organisation; *Inter-company Learning* can be done through benchmarking and companies creating learning partnerships; *A Learning Climate* is an organisational environment where people can experiment and learn from experience; and *Self-development Opportunities for All* is about making learning opportunities, resources and materials available to everybody in the organisation. From there, Pedler *et al.* (1997) created a blueprint for the modelling of a learning organisation, grouping the eleven elements into given clusters: strategy, looking in, structures, looking out and learning opportunities.

Pedler *et al.*'s (1997) model of the learning organisation seems more pragmatic from a practitioner's perspective to initiate change in an organisation, but does not differ considerably from what Senge proposed. Things are mainly presented in a different way, such as for example a 'learning approach to strategy', which seems to bear many similarities to Senge's (2006) 'mental models'. Both frameworks present a different 'model' of the learning organisation, each with its respective prescriptions on how to achieve this goal. Pedler *et al.* (1997) have also developed a measuring tool called 'The Learning Company Questionnaire', which is presented in more detail later in this chapter.

As with Argyris and Schön's (1978) idea about organisational learning, and Senge's (2006) framework of the learning organisation, Pedler *et al.*'s (1997) eleven characteristics may impact on the skills that make leaders successful to create those conditions and structures characteristic of a learning organisation. 'Enabling Structures' for example may result in organisational structures that will change how leaders manage their business and lead their people, with a potential shift from control towards

participation and involvement. Developing a 'Learning Climate' will require leaders' ability to let employees take risk, try out new things, accept failure and subsequently learn from it. Such skills or mind-sets may not always be naturally inherent in all leaders.

Karen Watkins and Victoria Marsick

Watkins and Marsick (1993) elaborate on the concept describing the learning organisation as '*... one that is characterized by continuous learning for continuous improvement, and by the capacity to transform itself*'. Watkins and Marsick (1996) view the learning organisation as an integrative model, where learning is a continuous process, used strategically, and is integrated with overall work processes (Yang *et al.* 2004). This model therefore integrates both structure and people, as they are focusing on leveraging learning on several levels: individual, team and organisational or system learning.

Many writers address the distinction between individual and organisational learning (e.g. Argyris and Schön 1978), and although writers have broadly agreed that individuals have to learn for organisations to learn, learning by individuals is not considered enough alone for organisations to change (Watkins and Marsick 2003). Watkins and Marsick (1996) clearly argue for a distinction between different levels of learning, and that change must occur on all levels of learning – individual, group, organisational and environmental. These changes must become new routines, in order to use organisational learning to improve organisational and business performance.

Theories of the learning organisation have emphasised that an organisation needs to work with people at the individual and group level first, and needs to empower people to take initiative to learn (Yang 2003). At the *individual level*, continuous learning opportunities need to be created, allowing members in the organisation to acquire knowledge and skills. Such opportunities include experiential learning on the job, assessment and coaching, as well as formal learning through training programs and courses. Alongside this, the organisation needs to create opportunities for employees to experiment, question the status quo, give and receive feedback, and promote dialogue in general (Watkins and Marsick 1996). At the *group level*, individuals learn as teams, focusing on collaboration and teamwork. An example in practice would be group workshops, action learning programs, or the creation of cross-functional or cross-

departmental teams to work on specific projects (Watkins and Marsick 1996). This is then followed by learning at the *structural level*, incorporating individual and group learning, and capture all in standard operating procedures, work processes, operations manuals, information systems, and the organisational culture. Learning at the *organisational level* is described as the most difficult, and least practiced by companies as it requires the establishment of effective systems to capture and share learning, and gaining organisational consensus and commitment from all employees through empowering them toward a collective vision (Watkins and Marsick 1996). The last level in this framework of the learning organisation is learning at the *global level*, where organisations connect to their environment. This entails thinking outside of the organisation, thinking globally, and assessing leadership in the organisation to ensure that leaders are role models and support learning on all levels (Watkins and Marsick 1996). The outcomes are then organisational learning, and a resulting increase in organisational performance (Yang 2003).

The concept of learning on different levels may also impact the kind of skills a leader would need to be successful in a learning organisation as described by Watkins and Marsick. Those leaders would require having the ability to continually foster learning simultaneously on individual, group, organisation and environmental level, and to ensure that those changes become new routines in the organisation if learning is to improve organisational and business performance.

To measure an organisation's learning culture, Watkins and Marsick (1996) developed the 'Dimensions of a Learning Organization Questionnaire' (DLOQ), an instrument that was also validated by relating it to organisational performance (Tsang 1997). As with Pedler *et al*'s (1997) 'The Learning Company Questionnaire', the DLOQ is a holistic assessment tool of an organisation's learning capabilities based on the author's model or framework of the learning organisation.

As outlined earlier in this section, most of the learning organisation frameworks and definitions have common denominators, such as leadership, finding purpose, questioning, empowering and evaluating (Moilanen 2001). The more prescriptive writings of Senge (2006) and Pedler *et al.* (1997) have the same type of elements in their respective learning organisation concepts, but expressed in different ways. Argyris and Schön's (1978) writing has less in common with those two, and their work is more

process-oriented. But there is some commonality between the frameworks of Argyris and Schön (1978), Senge (2006) and Watkins and Marsick (1993): that the organisational learning process is the key of the learning organisation, that collective thinking and competencies are the base of a successful learning organisation, and that a learning organisation is a systematic environment, allowing for continuous learning. A number of writings characterise the learning organisation as a journey rather than a destination (e.g. Appelbaum and Gallagher 2000, Ortenblad 2001). Although similar, there is no consensus on a definition and a specific set of definitive characteristics of learning organisations, and in turn no consensus on how to measure the concept best (Jamali and Sidani 2008).

For the purpose of this study, the model of Watkins and Marsick (1993) was used to frame the learning organisation context⁵. It represents a comprehensive and integrative framework of the learning organisation (Yang *et al.* 2004), with a clear distinction between the levels of learning, a link to organisational and business performance as outcomes, and with a measuring tool that was developed and validated based on several years of research (Tsang 1997). The research also takes the stance that the learning organisation is not an achievable outcome, but a goal towards which organisations should strive if they aspire to cope with continuous change. In view of using this framework, this study also benefitted from the ‘Dimensions of the Learning Organization Questionnaire’ tool, which is discussed in more detail later in this section.

⁵ This study favoured the concepts of organisational learning and the learning organisation as a base for the research, with their focus on people and learning, over that of knowledge management with its focus on tools and knowledge (Scarborough and Swan 2001).

Two sides of the same coin

While some commentators may use both terms inter-changeably, most of the literature actually differentiates between the terms ‘organisational learning’ and ‘learning organisation’ (Easterby-Smith and Araujo 1999), as outlined in Table 2 below.

Authors	On difference between		Researcher's Summary of concept
	Organisational learning	Learning organisation	
Argyris and Schön (1996)	Terminology for academics	Terminology for practitioners	Different terminology, but share common themes
Sun (2003)	Process of collective learning	LO: Concept and subject of research A LO: image or representation of LO.	Explores linguistic differences
Watkins and Marsick (1993)	Actual process	Ideal	But OL can be an ideal as well
Nyhan <i>et al.</i> (2004)	Process to achieve the goal of becoming a LO	Goal to be achieved, which should include OL	Represent two sides of the same coin
Gorelick (2005)	Dynamic interchange of a number of factors	OL is part of LO.	OL and LO can and should co-exist.
Ortenblad (2001)	Process; Focus on understanding the nature of learning in organisations	Ideal organisation form; Focus on development of normative organisational models	Viewed from classical perspective. The LO can also be a process.

OL = organisational learning LO = learning organisation

Table 2 – Organisational learning and the learning organisation

Research in the area of organisational learning is approached differently across different disciplinary perspectives (Easterby-Smith 1997), and puts emphasis either on the process, the actors or the conditions of learning. The ‘process of learning’ is prominently based on writers such as Argyris and Schön (1996), who distinguish between single and double-loop learning. Senge (2006) also addressed the learning process by distinguishing between adaptive and generative learning, very much in line with Argyris and Schön’s model of single and double-loop learning. The debate around the ‘actors of learning’ revolves around whether organisations can really learn, or whether only individuals can. Argyris and Schön (1996) as well as Senge (2006) argue that only individuals can learn, and that the individuals therefore are the main actors in organisational learning (Lahteenmaki *et al.* 2001). The ‘conditions of learning’ strand of the debate focuses on the elements of a learning organisation (Garavan 1997), such as the framework presented earlier by Pedler *et al.* (1997), Senge (2006) and Watkins and Marsick (1993), arguing that there has been a shift within the field away from looking at the learning organisation as the ‘panacea’ for any organisational improvement, towards a more pragmatic emphasis on the process of organisational learning.

When looking at the particular relationship between the two concepts or terminologies, a common theme begins to emerge: that is the notions of the ‘learning organisation’ and ‘organisational learning’ seem to represent two sides of the same coin: the ‘learning organisation’ can be seen as the goal to be achieved, and ‘organisational learning’ as the process to achieve this goal. Some writers have argued that an adequate description of a learning organisation has to include both the process of organisational learning and the goal of becoming a learning organisation (Nyhan *et al.* 2004).

This study echoes the argument of Nyhan *et al.* (2004) that the two terms seem to represent two sides of the same coin: the ‘learning organisation’ as the goal to be achieved, and ‘organisational learning’ as the process to achieve this goal. This view is also consistent with the Watkins and Marsick’s (1993, 1996) definition of the learning organisation used in the study: an organisation that ‘...is characterized by continuous learning for continuous improvement, and by the capacity to transform itself’ (Watkins and Marsick 1993, 1996).

Critiques of the learning organisation

There is little consensus around a definition of the learning organisation (e.g. Grievies 2008, Garvin 1993), and a sense of non-fulfilment of the optimistic forecasts in the 1980s when the learning organisation was first popularized (Nyhan *et al.* 2004). The concept is still very intangible, with little pragmatic operations advice that leaders could use, and a variety of measurement instruments looking at different dimensions of the concept (Grievies 2008).

'The learning organization concept is naively apolitical ... it assumes that people share the same interests, are not abused by exploitative managers, and are not driven by systems that seek to maximize effort at the expense of rewards.' (Grievies 2008: 470)

The criticisms that have been made of organisational learning and the learning organisation are numerous, and it is important that one is aware of the potential conceptual flaws that might impact on the work of both researchers and practitioners. The rather prescriptive literature of the learning organisation (e.g. Senge 2006, Pedler *et al.* 1997, Watkins and Marsick 1993) argues that becoming a learning organisation is predictably a good thing, and that there was a need for all organisations to embark upon the journey of becoming a learning organisation. But in reality, there are a number of organisations that are not looking to compete based on the 'high skill / high quality' model, and that are therefore not seeking continuous improvement and innovation as presented as an outcome of becoming a learning organisation (e.g. Ashton and Green 1996, Keep 2000, Keep and Rainbird 2000). The new organisational model as proposed by Drucker (1990), with flatter, non-hierarchical and more networked forms of organisations, more autonomous work with self-monitoring, adaptable and highly skilled workers engaged in continuous learning. Alternative approaches to competitive advantage have been taken, following very diverging routes, such as seeking protected markets, non-organic growth through mergers and acquisitions, monopoly power, or simply adopting cost-cutting strategies and new forms of Fordism (Brown and Keep 2003). In essence, this suggests that claims regarding the universal popularity and necessity of the learning organisation model should be treated with caution. Within the United Kingdom context for example:

'... research in this area tends to confirm that the high-performing workplace looks set to remain the experience of the minority of the UK workforce for the foreseeable future.' (Brown and Keep 2003: 77)

Another critique of the learning organisation concept is the assumption that the interests of employees and employers are in general reconcilable, reflecting the more North American views of human resource management, whereas in many countries those interests might be at odds from the start, reflecting the more industrial relations view with its focus on trade unions and collective bargaining (e.g. Grievies 2008). Under the North American perspective, organisations realised that competitive advantage could be seized and sustained through the effective utilisation of human resources, viewing human resource professionals as potential business partners who could participate in strategy planning and implementation (Schuler and Jackson 1995). Although in essence coming from North America (Brewster 2007), human resource management often looks different elsewhere:

'Whereas HRM in the USA typically focuses on the firm, HRM in Europe is conceived of more broadly, providing better explanation of the potential differences in views about the topic and a better fit with the concerns of the specialists, by including national institutional and cultural issues such as the trade union movement, national legislation and labour markets not as external influences but as part of the topic.' (Brewster 1995, cited in Brewster 2007: 241)

The Industrial Relations perspective of a number of countries outside of North America, such as the United Kingdom for example, where the interests of employees and employers are seen as potentially being at odds, will view a concept such as the learning organisation as more problematic. Illustrating this, Coopey (1995) for example argues that the ideology underlying the concept of the learning organisation can easily be changed from promising employees more participation and empowerment, to coercive control, exploitation and disempowerment. Although the concept can foster more employee participation through the encouragement of learning at all levels, organisations, or a handful of powerful elite groups, may have full control over what kind of learning may take place (Driver 2002):

'The "learning organization" is naught but a Hawthorne light bulb with a dimmer switch, intended to stimulate productivity regardless of its chameleonic brilliance. It is a Machiavellian subterfuge. It is a pimp, and the employees, the hapless prostitutes.' (Armstrong 2000, cited in Driver 2002: 44)

The same argument is presented by Keep (2000) who examined the applicability of the learning organisation concept in the United Kingdom context. He highlights that only few organisations have or are about to become a learning organisation, and that unfortunately, the assumptions that organisations would not only train employees in narrow technical skills but foster the development of wider transferable skills, was in large part mistaken due to the emphasis on short-term profits as requested by shareholders, the choice of marketing strategies based on a narrow range of relatively standardised goods and services, and the adoption by many organisations of traditional Taylorist work forms with low trust between employees and management (Keep 2000, Grievies 2008). This does not provide fruitful grounds for building learning organisations, but does not exclude those organisations from being successful.

The notions of power, control and politics are mentioned in many critiques of the learning organisation (e.g. Coopey 1995, Coopey and Burgoyne 2000, Keep 2000, Eijkman 2011, Owenby 2002), as most of the writings of the learning organisation adopt an apolitical and unitarist framework, obscuring the extent of political activity in organisations (Coopey and Burgoyne 2000). In general, authors writing about the learning organisation are predominantly concerned with the '*... instrumental dimensions of company culture - a means to achieve economic success*' (Fischer 2003: 40). The concept is largely North American influenced and treated mainly in connection with economic effects, resulting in a neglect of the political and social dimensions of a learning organisation. The rather prescriptive, business-school management approach to organisational learning neglects the attention to ensuring personal learning benefits for all employees (Fischer 2003). Power, control and political relationships cannot be simply ignored, with organisations and the process of organisational learning being inherently political. Organisational learning emphasises the generation of new ideas, interpretation of knowledge, and integration and institutionalisation of this knowledge. Each of these sub-processes of organisational learning are, as highlighted above, inherently political as they depend on power of the individual actors involved (Lawrence *et al.* 2005). This critique of the potential power-blindness of many accounts

of the learning organisation suggests the need to question the universal applicability of the learning organisation concept, and that research in organisations should not neglect those social and political dimensions of a learning organisation.

In some organisations, the current structure may not allow for the creation of a learning organisation (e.g. Keep and Rainbird 2000, Gephart *et al.* 1996), in others the culture and climate may put additional barriers to organisational learning in place (e.g. Eraut *et al.* 1997, Slater and Narver 1995). In particular the hotel industry has been one of the last to recognise the benefits of flatter, team-based organisational structures that assist in reducing barriers to knowledge transfer (Brownell 2008). Traditionally, the nature of the hotel and hospitality environment required well defined jobs, tasks and standard operations procedures to cope with the highly dynamic and unpredictable work (Brownell 2008). Such traditional structures can represent an obstacle to knowledge sharing in organisations, as organisational knowledge will not increase, or may even decrease, if not shared by employees who are interested to learn from each other (Hendriks 1999). Or as Teare and O'Hern (2000) highlight:

'If the organization is too rigid or hierarchical, then the "the good ideas" will live with the enthusiasts and perish with the die-hards that refuse to renew their learning regularly.' (Teare and O'Hern 2000: 99)

A number of critiques were also raised in particular with Senge's (1992) work, such as his reification of the organisation, presenting the abstract concept of an organisation as a concrete entity that has '*.... an existence beyond the level of the individuals who are the units of its constitution*' (Hughes 2000:9). The critique addresses the dilemma of individual versus organisational learning that is often discussed in the learning organisation literature (e.g. Senge 1990, Watkins and Marsick 1993), emphasizing the argument that organisations as such cannot learn, but only people can. Other criticisms of Senge's (2006) view of the learning organisation include the neglect of factors in organisations that would be outside the practitioner's or consultant's control when developing a learning organisation, such as the broader political, institutional or organisational context of the environment, as well as the potential demand of senior leaders to have an endless faith in the value of continuous development, which certainly is not always the case (Hughes 2000).

Implementing organisational learning processes has been challenging in general for several companies, with many good ideas and intentions being poorly designed and incorrectly implemented as highlighted by Appelbaum and Gallagher (2000):

‘... managers take complicated concepts, oversimplify them, expect too much out of them, do not make adequate preparation for implementation and then give up on them too quickly.’ (Appelbaum and Gallagher 2000: 48)

Along with being labelled prescriptive, intangible and difficult to implement, Tsang (1997) adds that the writings on the learning organisation are rarely based on rigorous scientific research, and often don’t qualify as good theories.

These various critiques and potential difficulties (see Table 13 below) are important to consider when researching organisations on the journey to become ‘learning organisations’. As outlined earlier, the claims regarding the universal popularity and necessity of the learning organisation model are not always accurate, and the rather prescriptive learning organisation framework might neglect some of the more social and political dimensions of organisational learning. If an organisation embarks on a journey to become a learning organisation, creating structural and human capacity for increased adaptability to change, it becomes evident that the learning agenda is set by the organisation’s leadership to fulfil their goals and often to retain control, and not necessarily with the main objective to put employees at the centre of it. This study does not accept the learning organisation or organisational learning at face value, but adopts a more balanced view considering both the positive and negative aspects of the concepts. This is also in line with Owenby’s (2002) argument that the potential ‘dark side’ of the learning organisation is not inevitable, and may be overcome only if the power and control dynamics of organisations are closely scrutinised as part of the change process.

Difficulties and critiques	Writers
Lack of consensus of meaning and definition	Garvin (1993), Grievies (2008), Eijkman (2011)
Questions around Management	Garvin (1993), Tsang (1997)
Lack of consensus of how to measure a learning organisation	Garvin (1993)
Politics and control, unitarist approach to power	Coopey (1995), Coopey and Burgoyne (2000), Keep (2000), Eijkman (2011), Owenby (2002)
Coercive persuasion, exploitation	Rebelo and Gomes (2008), Marsick and Watkins (1999), Coopey (1995), Owenby (2002)
Reification of the organisation	Hughes (2000)
Consideration of other factors, structure, culture, values, long-term objectives	Hughes (2000), Grievies (2008), Appelbaum and Gallagher (2000), Eijkman (2011), Owenby (2002), Keep and Rainbird (2000), Eraut <i>et al.</i> (1997), Slater and Narver (1995)
Individual vs. organisational learning dilemma	Hughes (2000)
Commitment to learning vs. reality of short-term profits, leadership support	Keep (2000), Grives (2008)
Transferable skills vs. production of standardised goods	Keep (2000), Brown and Keep (2003)
Concept founded in American economic principles	Fischer (2003)
Lack of role model examples and success stories	Keep (2000), Nyhan <i>et al.</i> (2004)
Too prescriptive, presented as a panacea	Nyhan <i>et al.</i> (2004), Appelbaum and Gallagher (2000)
Unclear link between the learning organisation and business performance	Brown and Keep (2003), Marshall and Smith (2009)
Research not rigorous	Mullins (2005), Tsang (1997)

Table 3 – Difficulties and critiques of the learning organisation

Measuring organisational learning and the learning organisation

To avoid venturing into technical methodological issues regarding how to measure, assess and research organisational learning and the learning organisation at this stage, this section will focus mainly on the tools addressing the writings and frameworks outlined in the previous section (see Appendix 1). Chiva *et al.* (2007) classify measurement instruments by aim, and by the conceptual background. Under aim, they differentiate between instruments that address either organisational capability to learn, such as the tools developed by Tannenbaum (1997) or Pedler *et al.* (1997) highlighting the main facilitators of learning, or the process of organisational learning, such as the tool developed by Bontis *et al.* (2002) that looks at a specific phase of the process of organisational learning. Under conceptual background, they differentiate between instruments that are based on the holistic concept of the learning organisation, individual learning, or another specific framework such as Crossan *et al.*'s (1999) 4I framework that underlies the measurement instrument developed by Bontis *et al.* (2002). Other classifications of measurement instruments are possible, such as the approach by Moilanen (2001) who classified them by different special interests, such as whether the questionnaire has other outcomes than just measuring organisational learning or the learning organisation, how widely the questionnaire covers the concept, how comprehensive the tool is, and whether it has been tested for validity and reliability.

'The Learning Company Questionnaire' developed by Pedler *et al.* (1997) for example would classify, according to Moilanen's (2001) framework, as not being archetypical and the only thing it measures is the learning organisation, as being holistic and covering a wide area of the concept, as profound and therefore very comprehensive, and as not statistically tested. The same tool in Chiva *et al.*'s (2007) framework would classify as aiming to measure organisational learning capability, and having the learning organisation as the conceptual background. Pedler *et al.*'s (1997) measuring instrument was initially the result of a research study in the United Kingdom, and was subsequently refined along with their concept of the learning company (Moilanen 2001). Although the instrument has been used in a variety of contexts, and that it exhibited high reliability, there were also some concerns and doubts about the content validity of the tool (e.g. de Villiers 2008).

The 'Dimensions of the Learning Organization Questionnaire' (DLOQ) developed by Watkins and Marsick (2003) would fall exactly into the same classifications as Pedler *et al.*'s (1997) instrument, based on the frameworks of both Moilanen (2001) and Chiva *et al.* (2007), with the sole difference that the instrument was actually tested for validity and reliability. Both their learning organisation model as well as the measuring instrument developed out of over sixteen years of practice and research, and were subsequently tested, validated and modified again through a number of research studies (Marsick and Watkins 2003). The DLOQ was designed to measure an organisation's learning culture, based on the seven dimensions of a learning organisation on individual, group and organisational level (O'Neil 2003). Considered as one of the most comprehensive questionnaires (Moilanen 2001), it has an empirically tested background, and covers the concept of the learning organisations very broadly.

Also interesting to mention is Moilanen's (2001) 'Learning Organization Diamond', grounded in the holistic approaches of writers such as Senge (2006), Pedler *et al.* (1997), and Argyris and Schön (1978). It is the only measurement tool found in the literature that was applied in a hospitality environment, assessing the 'Hotel Salpaus' in Finland as a 'learning' organisation. Although a very comprehensive tool, Moilanen (2001, 2005) is following the argument that the learning organisation is a goal that can be attained, and not necessarily as a journey, and that organisations are either 'learning' or 'non-learning' organisations.

Several instruments have been developed over the past years to measure various aspects of organisational learning and the learning organisations – some with tested levels of validity and reliability, and others that remained untested (Moilanen 2001). Most measuring tools have intervention and diagnostic as their main purpose, but are informed predominantly by a change agent's practice, and not by research (Gephart *et al.* 1996). Selecting the right instrument, based on the matching framework and definition of the learning organisation concept, and viewing the concept from the relevant perspective of the research question, is critical. The 'Dimensions of the Learning Organisation Questionnaire' (DLOQ) for example has also been validated in a number of settings (e.g. Ellinger *et al.* 2003 for the use within a business context) and across a number of countries (e.g. Jyothibabu *et al.* 2010, Song *et al.* 2009), and presents itself as the most extensively tested tool, and as a sound one to use. The learning organisation model as well as the measuring instrument developed were

regularly tested, validated and modified again through a number of research studies (Marsick and Watkins 2003, and according to Moilanen (2001) can be considered as one of the most comprehensive questionnaires that has an empirically tested background, covering the concept of the learning organisations very broadly.

The learning organisation in the hospitality industry

Although this part of the literature review was based on the hospitality industry, which covers a broad spectrum of businesses such as hotels, restaurants, coffee shops, cruise lines and more (Testa 2007), the overall discussion in this paper focuses predominantly upon the experiences within the hotel industry, in particular a large international hotel chain. This is important for context purposes, considering that the hotel industry is primarily made up of smaller and medium size businesses. The terms ‘hospitality industry’ and ‘hotel industry’ are therefore often used interchangeably in this chapter.

The hospitality industry is generally bound by more traditional work and employment processes compared with other industries, such as more hierarchical organisational structures and a preference for numerical rather than functional flexibility, even within the service sector (Teare and Bowen 1997). In particular, the hotel industry is challenged by the continual turnover of employees and the implementation of more labour flexibility combining full time and contingent labour (Brien and Smallman 2011). Managing these potential dual labour markets adds to the complexity in the industry (Davidson *et al.* 2011). Other particularities that characterise the hospitality industry described in the literature include staff and skills shortages, difficulty in attracting and retaining talent, and low prestige and status of the industry, in particular in the hotel industry (Kusluvan *et al.* 2010).

For large-scale hospitality operations, such as international hotel chains, standardisation is one of the main business processes to foster consistency and cost efficiencies (Ottenbacher and Harrington 2007). Such operations are based on global business practices in a multicultural environment (Sledge *et al.* 2008 in Chen *et al.* 2012), which makes them particularly complex and diverse. Innovative organisations therefore attempt to find the right balance between standardisation, innovation and creativity in order to foster adaptation and learning.

Research on organisational learning and the learning organisation in the hospitality industry, and in particular in the hotel industry, has subsequently been fairly scarce, and very often focuses on individual learning and training, rather than on the more generative perspective of organisational learning and the learning organisation. One example would be the study of Adams and Waddle (2002), examining the evaluation of individual learning and its impact on the organisation. They described the experiences of a major hotel group, which had implemented a ‘virtual university’, and their process of evaluating the impact individual learning had on the organisation. The conclusion was that there is a considerable return on investment from learning activities such as a ‘virtual university’, suggesting a further integration of learning and individual development into organisations’ overall strategy. Another example is the study of Harris (2010), who examined the alignment of individual learning initiatives to an organisation’s core purpose, using the case of another international hotel group. The organisation had adopted a virtual leadership community, to share best practices and deliver short training sessions on leadership. The outcomes of these initiatives were that that training could be provided to a broader audience, therefore increasing the overall number of learners without having to add additional trainers.

Although limited, there are a number of other studies that addressed organisational learning and knowledge management in the hospitality industry. Wong and Pang (2003) conducted a study in the hotel industry with the objective of identifying the job-related motivators of creativity and innovation as perceived by managers and supervisors in the hospitality industry. They argue that an organisation’s success in today’s business environment is the ability to adapt to and manage the speed of change, which requires both creativity and innovation – very much the same argument as used in most of the organisational learning and learning organisation literature.

‘... executives responsible for hotel planning, operations and management must be more creative and innovative than ever before as the hotel industry continues to experience problems in a world recently relegated to exogenous shocks such as foot and mouth in the UK, September 11, the Bali bombings plus the more normal competitive structures of new destinations and new assets competing for business.’ (Wong and Pang 2003: 551)

A similar argument addressing the need for organisational learning was also presented by Teare and Bowen (1997), in their examination of ‘environmental scanning’, which represents the managerial activity of learning about events and trends in the organisation’s environment, in the context of the hotel industry.

‘... the 1980s was a decade of turbulence for hotel companies. Inflation, terrorism, recession, war, political upheaval, global airline restructuring and the continued advancement of technology are but a few of the major events influencing performance.’ (Teare and Bowen 1997: 274)

Although still traditional at times, hotels also have to stay in touch with change in the environment, and show creativity in many areas, such as product innovation and on-going customer-service improvements. Top chefs for example, such as Michelin-starred chefs in top restaurants, are developing processes to drive fine dining innovation to become more competitive (Ottenbacher and Harrington 2007). But another potential dilemma of leaders in the hospitality industry is to balance a well-trained, motivated and engaged workforce, while at the same time keeping the necessary flexibility allowing to react to fluctuating business levels (Gjelsvik 2002). Hotels are often experiencing high employee turnover rates, making it more risky for them to invest in continuous learning and development. Traditional strategies selected by many hotels in the past were based on adaptation to environmental factors, resulting in numerical rather than functional flexibility with a considerable percentage of contingent workers. However, as argued by Gjelsvik (2002), this approach neglects the potential for internal interaction and actions to affect the external environment as proposed by Nonaka and Takeuchi’s (1995) concept of the knowledge-creating company. Gjelsvik (2002) further states that *‘... knowledge is generated through organizational learning. Knowledge creation and transfer of knowledge within the firm builds human capital ...’* (Gjelsvik 2002: 33), which would suggest that from an organisational learning perspective, hotels would have to consider retaining a higher share of permanent full-time employees, and recruiting more effectively from within through fostering stronger internal labour markets, to create superior learning organisations.

Although not unique, the hospitality workplace is also characterised by a number of other factors, such as has the general difficulties in recruiting, motivating and retaining employees, leading to high turnover. This is often fuelled by the fact that employees

often enter the industry with different expectations about the nature of the work, which although being a very dynamic environment, on the other hand often requires long working hours, as well as evening and week-end shifts (Brownell 2008). In addition to the factors outlined by Gjelsvik (2002) above, the nature of work in the hospitality industry is often unpredictable, typified by a considerable impact of environmental factors and frequent crisis management. Such an uncertain employment context would, on the face of it, appear to undermine the potential for certain pillars of the learning organisation (e.g. shared mental models) to thrive. However, considering all those factors, Brownell (2008) suggests that despite such problems the creation of learning organisations can assist the industry in being more successful implementing strategic plans. He observes that the hospitality industry has been one of the last to recognise the benefits of flatter, team-based organisational structures that can potentially reduce barriers to knowledge transfer. This would mean a move away from the traditional framework of well-defined jobs, tasks and standard operating procedures, but rather implementing more job flexibility to cope with the highly dynamic and unpredictable environment:

'While hospitality organizations are not unique in their frequent failure to capture and tap into informal networks, the fast pace of events and the demand for coordination make them one of the most challenging.' (Brownell 2008: 214)

One of the few studies that addressed the actual process of organisational learning within the hotel industry is the writing of Yang (2004, 2009), who examined the practices of knowledge capturing and organisational learning of two hotels in Taiwan. He draws attention to the importance of individuals collecting and identifying useful knowledge, the exploitation and useful application of this knowledge, the dissemination throughout the organisation, and the subsequent conversion of this information into valued organisational knowledge. He argues that organisations need to trigger the first part of the process, knowledge capturing, if they want organisational learning to occur.

Another interesting study by Kwortnik (2006) outlined the argument that the hotel industry only shows limited organisational learning. The study was not focused primarily around organisational learning, but addressed the great service recovery of hotel employees during the 2003 blackout in the North Eastern part of the United States.

He highlighted the limited organisational learning of the hospitality industry to plan for eventual future power failures.

When researching the literature around the concept of the ‘learning organisation’ in the hospitality industry, and in particular in the hotel industry, the evidence base becomes scarcer still. A yearly publication by the American Society of Training & Development (2010), the BEST Awards, is supposedly rewarding learning organisations, and every year a number of hospitality organisations are included. But the awards often address only parts of what a learning organisation is supposed to be, such as for example guest service delivery or leadership development. A few studies have been conducted, using learning organisation measurement tools in the hospitality industry, such as the one by Moilanen (2005) who applies his measurement instrument ‘The Learning Organization Diamond’ to different business settings in order to validate the tool – and one of the business settings was a hotel. His results actually showed that the ‘Hotel Salpaus’ was a good example of an organisation that scored high on his instrument; although the scores were overall well balanced between organisational and individual learning, the organisational learning score was very strong compared to other companies. Moilanen makes an interesting point here for the applicability of the learning organisation concept in the hospitality industry: the way he describes the hotel Salpaus (see Moilanen 2005: 83), the hotel does not seem to represent the typical more traditional hotel characteristics, but is privately owned, has a stable ownership, makes investment over time, and seems to enjoy good returns on investments. The hotel seems to have a clear goal of exceeding customer expectations, but seems to have chosen a path to reach this goal through employee satisfaction, rather than at the cost of it (Moilanen 2005: 84). He also argues that the high organisational learning scores give a good indication that leaders at the hotel have created an environment where ‘... *discussion is allowed and encouraged and means for change and learning are provided*’ (Moilanen 2005: 83).

Two more studies address the argument around creating learning organisations in the hospitality industry. Akin, Aksu and Ozdemir (2005) explored organisational dimensions that enable individual learning in hotel establishments, and stressed the importance of a learning climate and culture in the learning organisation. Although they talk about the learning organisation, most of their discussions revolve around optimising individual learning. Bayraktaroglu and Kutanis (2003) analysed and evaluated the main

perspectives on organisational learning, particularly in relation to the hospitality industry. They argue that in today's business world, the most valuable assets are 'information', 'knowledge' and 'people', which thus for them presents the perfect logic to look at the concept of the learning organisation.

In summary, although organisational learning and the learning organisation have been examined in a wide variety of contexts, industries and national cultures, there are only few studies available that either addresses the hospitality industry, or the hotel industry in particular, or where the hospitality industry was a research ground. One reason may be the perceived difficulties in applying the learning organisation concept to this industry, with issues such as high turnover posing potential barriers to the introduction of learning organisation structures and practices. A number of hospitality organisations are mentioned or have been described as learning organisations, but with the exception of Moilanen's (2005) 'Hotel Salpaus', there is little evidence of this concept actually existing in this industry. Any further research within the hospitality industry around organisational learning and the learning organisation would therefore contribute to existing knowledge, by potentially developing a 'learning organisation model' for the hospitality industry, and the hotel industry in particular. Although a small variety of writers look at organisational learning and the learning organisation concept in the industry, there does not seem to be one that brings all together and consolidates the learning into one learning organisation model for the hospitality industry. This study, investigating a hospitality company's journey towards becoming a learning organisation, and the skills that help leaders to create the conditions and structures characteristic of a learning organisation, will make a further contribution towards developing such a model in the future.

Leadership in the Learning Organisation

Introduction

The learning organisation literature addresses in most cases the critical role of leadership in putting in place structures to foster organisational learning, and in setting up a climate of continuous learning on all levels of the organisation. Although, as outlined earlier, Bass (2000) and Senge (1999) adopt a rather unitarist view of the leadership skills needed to build and maintain learning organisations, other writers clearly recognise that wider organisational, political, cultural or environmental factors cannot be ignored.

Researching the literature for leadership in learning organisations is not an easy undertaking. When looking at recent leadership studies in general, the abundance of writings is simply overwhelming. A better approach was to identify first a number of studies that linked leadership explicitly to organisational learning or the learning organisation (e.g. Bass 2000, Chang and Lee 2007, Ellinger *et al.* 1999, Slater and Narver 1995, Senge 1999/2006, Richardson 1995, Antonacopoulou 1999), and complement this with references to leadership from more generic studies of organisational learning and the learning organisation (e.g. Elkin *et al.* 2011, Goh 1998, Senge 1990, Pedler *et al.* 1997) and with a number of targeted writings by different authors about ‘new’ leadership paradigms in general (e.g. Bass 1997, Mumford *et al.* 2000, Hunt 1999, Marquardt 2011).

In a subsequent step, the various writings were analysed based on what kind of leadership attributes they described. A number of writings outlined the overall ‘roles’ of leaders, others addressed more defined ‘skills’ and/or ‘styles’, and some addressed particular ‘attitudes’ or ‘mind-sets’ leaders should have. Although the review in this chapter has been structured around those four categories, there certainly is considerable overlap between each group, with some writings potentially fitting into several categories, and linking to each other. From a theoretical perspective, it therefore is difficult to clearly support those distinctions, other than ‘mind-sets’ that look at leadership really from a different and softer perspective.

The majority of writings that were connected with organisational learning and the learning organisation, also outlined the impact leadership potentially has on those

concepts. Another item that differentiated the various writings was the level of leadership it addressed: half the studies mainly described leadership skills or roles of senior leaders, executives, top management or even the CEO. These writings were very often concerned with the impact senior leaders had on the creation and maintenance of a learning organisation (e.g. Popper and Lipshitz 2000, Richardson 1995, Vera and Crossan 2004), whereas the other half of writings were more concerned with generic leadership skills for leaders at all levels – supervisors, managers and senior leaders (e.g. Mumford 1995, Mumford *et al.* 2000, McGill *et al.* 1992, Tannenbaum 1997, Eraut *et al.* 1997).

A detailed table outlining the above analysis is available in Appendix 2.

Managers and Leaders

Although the debate about ‘managers vs. leaders’ is outside the scope of this study, this short section might be helpful in understanding how the researcher uses the terms in the context of the study. This debate has been extensively written about, with extremes ranging from the perspective that the terms are different with managers focusing on control and leaders on getting people to follow, to the point of view that there is no difference between terms such as ‘management’ and ‘leadership’, or that leaders can exist on all levels of an organisation.

A number of writers explicitly differentiate between what ‘managers’ and ‘leaders’ are (e.g. Zaleznik 1992) in terms of the former for example being driven by a more narrow purpose and the latter by focusing on broader strategies and goals. Cordes and Ibrahim (1996) follow a similar argument, and list a number of different characteristics for ‘managers’ and ‘leaders’, but make an interesting point that ‘*To be an effective manager, an individual must first be a leader*’ (Cordes and Ibrahim 1996: 41). They argue that the main difference between a ‘manager’ and a ‘leader’ is that the more technical managerial skills come with the job role, but that leadership had to be earned. In their view, a manager must know how to manage and lead as well.

Another strand of thought is that ‘managers’ simply evolve to become ‘leaders’, and that ‘leadership’ plays an important part for both roles (e.g. Archambeau 2005). The most marking career passage according to Archambeau (2005) is the one from individual contributor to team manager, where the need for leadership increases

significantly. As an individual moves up higher in the organisation, to what Archambeau (2005) calls functional managers and top-level leaders, this need for leadership further increases. In essence, Archambeau (2005) uses the terms ‘manager’ and ‘leader’ as a progression, but with both roles requiring a growing need for leadership.

Although there is a lack of consensus between the different writings, the emerging theme is that the responsibilities of managers are more technical and tactical, and those of leaders more emotional and strategic (for more details about differing responsibilities/characteristics see e.g. Cordes and Ibrahim 1996). Figure 1 below outlines how the various terminologies and meanings that are used within this study.


Theoretical Model			Case Study Organisation	
 Progression	Individual contributors			
	Manager responsibilities	Leader Leadership	Hotel Middle Managers	e.g. Banquet Manager, Front Office Manager, etc.
			Hotel Senior Leaders	e.g. Catering Director, HR Director, General Manager
			Corporate Leaders	e.g. Corporate Directors, Vice Presidents and above

Figure 1 – Managers and Leaders

The study therefore does not adopt a ‘leaders on all levels’ perspective, but rather defines ‘leaders’ from a more hierarchical and organisational perspective, focusing on a group of individuals whose work includes manager and/or leader responsibilities. There is a progression from the responsibilities of an individual contributor, to manager and leader, and a growing need of leadership in the latter two. In the context of the case study organisation, this group of ‘leaders’ would therefore include the middle management and senior leadership team in the hotels, as well as the Corporate leadership team. Although writers such as Senge (1990) argue that leadership should not belong to a specific group of people at the top of the organisation only, but should be distributed to ensure that everybody can be accountable for leadership in his or her area, this study does not fully subscribe to this view but views leaders as a more narrow

group as outlined above. This is an important point, as it has subsequent methodological implications for this research.

Leadership roles

Table 4 summarises the findings of such writings with regard to the different roles of leaders in learning organisations. Studies following this theme concentrate on what leaders in learning organisations should (or actually) do. Many writers outline the importance of leaders in creating structural foundations to ensure that individual learning translates into group and organisational learning. As described by writers such as Popper and Lipshitz (2000), this role applies mainly to more senior leaders in an organisation, who are in a position to create organisational learning mechanisms and structures to shape a learning environment and culture. Similarly, according to Goh and Richards (1997), organisational learning happens only if the organisation is appropriately structured and managed. On the other hand, those writers who emphasise the role of leaders in promoting systems thinking (e.g. Senge 1990, Marquardt 2000), believe that such roles can be fulfilled by leaders at all levels of the learning organisation – not just at the top of the hierarchy.

The role of creating a learning environment is the most widely mentioned, but also the broadest role of leaders within the literature on learning organisations. Antonacopoulou (1999) describes the leader as a ‘learning manager’, based on the argument that managers need to recognise the need for learning and engage actively in learning as well. Their role is to create an environment that not only facilitates learning, but also encourages and rewards it. Role modelling of learning is being mentioned frequently, along with the need of leaders to champion learning and show enthusiasm for learning and development (e.g. Mumford 1995). Leaders that show a high level of learning agility, meaning that they have the ability to learn easily, spend time to gain self-insight and continue their own personal development, are seen as effective role models for other employees to follow. Senge (1999) perceived such modelling to be important due to the reluctance of many people to engage with learning for fear of being perceived as inadequate. As he put it: *‘To be a real learner is to be ignorant and incompetent. Not many top executives are up for that’* (Senge 1999: 12). The same argument is presented by Watkins and Marsick (1996), who recommend looking for leaders in learning organisations who model and support learning at the individual, team and organisational

level, as they in general ‘... *think strategically about how to use learning to create change and to move the organization in new directions or new markets*’ (Watkins and Marsick 1996: 7).

Building shared visions is one of Senge’s (2006) five disciplines of the learning organisation, with the goal of fostering commitment rather than compliance from people. This again seems to be one of those roles that would be attributed to more senior leaders in an organisation, who are visionaries, can build a motivating vision and subsequently roll-out this shared vision in the organisation. On the other hand, Marquardt (2000) also stresses the broader role of managers in general to help building a shared vision and inspire others to follow this vision.

Other writers have argued that great leaders develop people around them (e.g. Slater and Narver 1995), and foster the development of a strong leadership pipeline in the organisation. With leadership being one of the building blocks of the learning organisation (Goh 1998), this development function is regarded as a crucial role for leaders. Developing others, and especially developing other leaders, is described in parts of the literature as demanding a shared approach to leadership, a culture of distribution of leadership at all levels, and the willingness of leaders to give up power (McGill *et al.* 1992). Senge (1990) describes this role as ‘leaders as teachers’, emphasizing the importance of coaching others, facilitating their development and guiding them to potentially restructure their view of reality and try to solve old problems with new approaches. The idea being presented by these writers, therefore, is that a leader in a learning organisation needs to develop others as well as themselves.

The leader’s role in fostering innovation and change is also a popular theme in a number of writings. In his description of the leaders in the 21st century, Marquardt (2000) stresses the importance of creating an environment where people are allowed to take risk and are allowed to experiment, without fear of punishment. In this view, leaders have to be able to tolerate mistakes when individuals are applying new skills during learning periods, but have to balance this as well with the need to maintain high customer service scores and a high quality of service overall (Tannenbaum 1997). Also part of this role is the leader being a change agent (Marquardt 2000), being competent in creating and managing change, and therefore be able to influence others to look for continuous improvement as well.

The last leadership role commonly referred to in the learning organisation literature revolves around the creation of a culture of trust, and being a servant leader (e.g. Popper and Lipshsitz 2000) or steward (Senge 1990). Servant leaders serve first and then lead, are stewards for the people they lead, and often work for a larger purpose beyond themselves, and even the organisation. Steward leaders are value driven and inspire trust, a theme that will be referred back to again a little later in this section on ‘Leadership in learning organisations’. In terms of the learning organisation, Senge and Kofman (1993) argue that learning organisations are built by communities of servant leaders, who are leaders that serve others as well as a higher purpose, are both idealist and pragmatists, and are highly practical. Servant leaders choose to serve first and then lead, and move people to a higher-level self-awareness by actually leading people at a higher level (Serrat 2009). The philosophy of servant leadership goes back to Robert Greenleaf in the 1970’s, and is supported by a number of well-known authors such as Blanchard, Covey, DePree, Senge and Wheatley (Serrat 2009). The principal role of a servant leader is to serve followers, and to support and develop them to their fullest potential. Developing such leadership skills in people is a lengthy process, and not every manager would feel comfortable with this kind of leadership. Therefore, Senge and Kofman (1993) argue that putting more emphasis on recruiting leaders with those capabilities, and have role models in the organisation, will make a difference.

The table below summarises the key themes in the above discussion, and provides an overview of the leadership roles most prominent in the learning organisation literature.

Key words	Roles	Writers
Structure and systems	Create structural foundations; leaders as designers; systems thinkers; provide structures and systems that facilitate learning	Popper and Lipshsitz (2000), Senge 1990, Marquardt (2000), Gephart <i>et al.</i> (1996)
Learning environment	Create a learning environment; role model enthusiasm for learning; provide learning and development opportunities; integrate learning; champion learning; teacher/mentor/coach/learner; role model for learning; create a learning climate	Antonacopoulou (1999), Goh 1998, Mumford (1995), Marquardt (2000), Gephart <i>et al.</i> (1996), Eraut (1997), Watkins and Marsick (1996)
Shared	Establish a shared vision; visionary and vision-	Slater and Narver 1995,

vision	builder	Marquardt (2000)
Develop people	Developing People; staff developer; leaders as teachers	Slater and Narver 1995, Eraut (1997), Senge 1990
Innovation and change	Change agent; innovator and risk taker; allow for creativity and innovation and experimentation	Marquardt (2000), Gephart <i>et al.</i> (1996)
Servant and steward	Create a culture of trust; servant and steward; leaders as steward	Popper and Lipshsitz (2000), Marquardt (2000), Senge (1990), Senge and Kofman (1993), Serrat (2009)

Table 4 – Proposed ‘Roles’ of leaders in learning organisations

Leadership skills

Most writers describe leadership in terms of ‘skills’, and the list of eighteen proposed skills distilled from the literature can be found in Table 5 below. Again, some of those skills overlap with, or are actually a critical component of, some of the above-mentioned roles, but are listed individually below for analysis purposes. A number of the skills are also associated with either the roles of leaders discussed above, or styles of leadership following later. Popper and Lipshitz (2000) for example argue that research evidence about leadership in organisations has shown that transformational leaders are better at creating structural foundations for organisational learning and creating a culture of trust, where employees are allowed to experiment and make mistakes. Accordingly, they claim that this type of leadership is characterized by leaders that have strong values and the ability to influence through them, motivate others through inspiration, constantly evaluate and if necessary challenge the status quo, and are able to relate to each of their team members as individuals, coaching and developing them. The importance of influencing is also emphasised by Senge (1999) who argues that ‘learning leaders’ should articulate guiding ideas, and subsequently influence others through those ideas. Challenging the status quo is also picked up as a skill by Bass (2000), underlining that intellectual stimulation is needed to create a culture of innovation and creativity, where individuals can question the status quo and come up with new ideas on how to solve old problems.

Coaching is seen as another key skill said to be characteristic of the modern, more transformational leader, and the ability to give good and rich feedback (Bass 2000) and pass on what they have learned through coaching and mentoring (Marquardt 2000), is described as being crucial to fostering learning and develop individuals (Bass 2000). Coaching is a powerful skill for leaders not only to develop existing skills in people, but also to develop skills that they might need in the future (Ayupp and Perumal 2008).

Entrepreneurship skills, or the ability to recognise opportunities, allocate resources and create value with it, and market orientation, or the ability to learn from customers and competitors, are also seen as key for the more transformational and facilitative leader in today's complex and ever-changing environment (Slater and Narver 1995). Other skills associated with this style are the ability to empower others, as exemplified for some by the former General Electric CEO, Jack Welch, who was described as being successful at empowering his management teams to run their own business (Slater and Narver 1995), representing an important departure from the more control-command style of leadership and management towards a facilitate-empower style (Ellinger *et al.* 1999). Another interesting, and often neglected, skill identified in parts of the literature includes the ability to un-learn potentially detrimental practices from the past (Slater and Narver 1995), allowing transformational leaders to keep up with change and inspire others around them.

Mumford *et al.* (2000), examining the leadership skills required for today's changing world, argue for a 'skill-based' leadership model, and that effective leadership behaviour depends upon the leader's ability to solve complex social problems that arise in organisations. In this view, skills required therefore are problem-solving skills, social judgement and social skills, as well as a range of knowledge of the job, organisation, and the business and people in general.

Another key skill set that is sometimes described as important is communication, assisting transformational and facilitative leaders in inspiring others (Ellinger *et al.* 1999). This does not only address verbal communication and the way one expresses him or herself, but also stresses the importance of being a good listener, as proposed by Brownell (2008):

'We propose that leaders who focus on effective listening are best able to establish learning environments and are subsequently in the best position to implement the strategic plans that will facilitate high performance.' (Brownell 2008: 215)

In this view, leaders that are good listeners promote and create trust with and between employees, therefore fostering a learning environment that allows for knowledge transfer, which is one of the basic processes of a learning organisation.

A leader's ability in relation to self-learning has already been stressed, and one of the critical skills for this process is self-insight. Leaders have to have a good understanding of their own motivations and of themselves, before they can lead others (Mahoney 2000). High levels of self-insight and self-knowledge, or emotional intelligence as it is also called today, are also described in the literature as underlying characteristics of transformational leaders. Leaders in learning organisations should have high levels of emotional intelligence, as they will be looking for results that don't only benefit themselves, but also others and the wider organisation, and will foster participative decision making, which is also in most descriptions a key cornerstone of the learning organisation (Scott-Ladd and Chan 2004).

Systems thinking and the ability to build shared visions have also been mentioned above as often-cited key roles of leaders, and a number of writers add this to their lists of key skills for learning organisation leaders. Systems thinking has really two sides: on one side, leaders should be able to see the whole rather than the parts and be able to recognise how things are interrelated, and on the other side foster this thinking in others and ensure that everybody around them can see the bigger picture as well (Senge 1990). It is also one of the key skills associated with generative learning (McGill *et al.* 1992). Being a visionary is described as the skill of creating a shared picture of the future, resulting in commitment rather than compliance. The more people share this vision, it is claimed that the more real it will become, and the more people want to achieve it (Senge 1990).

The last two skills in Table 5 were only mentioned by Ayupp and Perumal (2008), mainly in the context of many managers feeling today that they have not received enough or the right training to develop the skills they need in the future. The skills they

are addressing relate to being inspiring and motivating, which was also mentioned by other writers, as well as teambuilding and selection - two very interesting skills required by leaders in learning organisations attempting to foster deeper or transformational change. Whether teambuilding can be considered a specific skill, or represents a set of skills such as communication, conflict resolution, motivation, influencing and others, is debatable within the literature, but its importance in this context is not. Selection is a key skill of leaders, and often gets neglected or is viewed as a HR specialist skill. Organisations depend heavily on the quality of their people to achieve their strategic objectives, and leaders are generally entrusted with the crucial task of ensuring that they recruit the right calibre of employee that will fit the organisation's culture, and that can add value to the organisation overall.

The table below summarises the leadership skills that feature most prominently in the learning organisation literature.

Skills	Writers
Influencing	Popper and Lipshitz (2000), Senge (1999)
Motivating and inspiring	Popper and Lipshitz (2000), Bass (2000), Ayupp and Perumal (2008)
Challenge status quo	Popper and Lipshitz (2000), Bass (2000), Bayraktaroglu and Kutanis (2003), Senge (1999)
Relating to others	Popper and Lipshitz (2000)
Coaching	Bass (2000), Ayupp and Perumal (2008), Ellinger <i>et al.</i> (1999), Slater and Narver (1995), Goh (1998)
Learning from others	Slater and Narver (1995), Bayraktaroglu and Kutanis (2003), Ellinger <i>et al.</i> (1999)
Entrepreneurship	Slater and Narver (1995)
Empower	Slater and Narver (1995), Ellinger <i>et al.</i> (1999)
Un-learning	Slater and Narver (1995)
Problem-solving	Mumford <i>et al.</i> (2000)
Social judgement skills	Mumford <i>et al.</i> (2000)
Social skills	Mumford <i>et al.</i> (2000)
Communication	Ellinger <i>et al.</i> (1999), Brownell (2008)
Self-insight	Mahoney (2000), Scott-Ladd and Chan (2004)
Systems thinking	Senge (1990), McGill <i>et al.</i> (1992)

Visionary	Senge (1990), Slater and Narver (1995)
Teambuilding	Ayupp and Perumal (2008)
Employee selection	Ayupp and Perumal (2008)

Table 5 – Proposed ‘Skills’ of leaders in learning organisations

Leadership styles

A number of writings in the organisational learning and learning organisation literature did not address a specific skill for leaders, but instead a higher-level style of leadership. These leadership styles overlap with and include components of both different leadership skills as well as roles, as outlined earlier in this chapter. Some of the authors argue for a single style (e.g. Popper and Lipshitz 2000), others for the use of a combination of styles (e.g. Vera and Crossan 2004) based on a number of contingent factors.

As emphasised by Senge (1990), it has often been argued that organisations need to adapt to the ever-changing environment, and leaders therefore need to motivate others to learn and adapt to those changes. It is this kind of adaptability to change that is characteristic of a learning organisation, and it is transformational leadership that relates to the creation and maintenance of such organisations (Bass 2000). Transformational leadership represents a paradigm shift from the traditional leadership of ‘doom and gloom’ as described by Hunt (1999), and is strongly associated with the creation of organisational learning mechanisms and structures, and with the shaping of a learning culture and a culture of trust (Bass 1985, cited in Popper and Lipshitz 2000: 141). Transformational leadership is characterised by the ability of leaders to motivate others through inspiration and to share their knowledge enthusiastically, by leaders having strong values and influencing through them, by the ability to constantly challenge the status quo and stimulate others intellectually, and by relating to team members as individuals, coaching and developing them (Popper and Lipshitz 2000). Transformational leaders are characterised as charismatic and adept at inspiring others to go beyond their own goals towards the larger goals of the organisation or even beyond, as well as at creating and translating visions and missions into action (Bass 2000). In summary, the argument goes that transformational leadership in organisations fosters an inclination for building shared visions, personal mastery and systematic cooperation, which all are part of Senge’s (2006) five disciplines of the learning

organisation. Moving towards becoming a learning organisation can be viewed as a transformation, and therefore it can be argued that without transformational leadership, this goal would be difficult to achieve (Chang and Lee 2007).

Transactional leadership is often mentioned alongside transformational leadership in the organisational learning and learning organisation literature. Transactional leaders focus more on the exchange benefit, or transaction, give clear direction, set goals and subsequently either reward or punish for achievement or non-achievement (Bass 2000). In Bass's view, the transformational-transactional leadership paradigm is universal, and can be observed in a number of organisations and cultures (Bass 1997). The majority of writers stress the importance of transformational leadership in creating and maintaining learning organisations, but also advocate a combined approach using behaviours from both styles. Bass (2000) argues that improving leadership skills means reducing the more directive transactional leadership and increasing the transformational leadership behaviours that inspire trust.

The overall theme in the leadership literature is that the traditional leadership paradigm with the charismatic forceful commander-leader has waned in popularity, and the new transformational and facilitative leader has accordingly become more prominent (Slater and Narver 1995). From a facilitative leadership perspective, managers are facilitators of learning in a learning organisation, which represents a marked departure from the control-command style of management:

'... adopting a new role identity as coach and facilitator of learning is a necessary phase of this transition in companies that are aspiring to become learning organisations.' (Ellinger *et al.* 1999: 113)

Facilitative leaders are seen as good communicators, and are skilled at encouraging others to learn and develop themselves. Leaders in learning organisations become the key developers of their employees, and together with learning and development specialists in their respective organisation, they will be able to create a broader learning infrastructure where learning is continuous and on all levels (Ellinger *et al.* 1999).

A number of other leadership styles are mentioned in the organisational learning and learning organisation literature, but have not received the same interest such as transformational, transactional and facilitative leadership. Hunt (1999) stresses the

importance of charismatic leadership, with leaders using their personality, grace and charm instead of power and authority to lead. Elkin *et al.* (2011) build on the same argument when examining the building of learning organisations in China. They argue that charismatic leadership, along with transformational leadership, by Chinese managers shows positive results on Senge's (2006) five disciplines of the learning organisation. Antonacopoulou (1999) proposes the concept of the 'learning manager', based on the argument that managers need to recognize the need for learning and engage actively in learning as well. Their role is to create an environment that not only facilitates learning, but also encourages and rewards it.

Richardson (1995) refers to 'situational leadership', exploring the variations of leadership skills needed by a learning organisation leader based on the learning context within the respective organisation. He argues that organisations with more self-organizing learning networks need leaders with softer, more political, social and cultural approaches; whereas organisations with a more classically administered and directed learning context require more skilful and planned approaches. He also concludes that in a successful learning organisation, leaders will be required to pay attention to both the hard and soft learning contexts. A number of other writers have addressed this more 'contingent' approach to leadership, which is addressed later in this section.

Styles	Writers
Transformational leadership	Popper and Lipshitz (2000), Bass (1997), Bass (2000), Chang and Lee (2007), Slater and Narver (1995), Hunt (2000), Vera and Crossan (2004), Elkin <i>et al.</i> (2011)
Transactional leadership	Bass (1997), Bass (2000), Chang and Lee (2007), Vera and Crossan (2004)
Facilitative leadership	Slater and Narver (1995), Ellinger <i>et al.</i> (1999)
Charismatic leadership	Hunt (1999), Elkin <i>et al.</i> (2011)
Learning manager	Antonacopoulou (1999)
Situational leadership	Richardson (1995)

Table 6 – Proposed 'Styles' of leaders in learning organisations

Leadership mind-sets

A number of different ‘mind-sets’ in leadership can also be identified in the literature, which are worth noting here as they form a common theme across most writings. It is of course true that there is a degree of overlap between these mind-sets and the styles, skills and roles discussed above but they really present a different perspective of leadership. However, as the following concepts are described in the literature, they tend to refer more to an over-arching approach or outlook that encompasses styles, skills and roles but cannot be reduced to any of them. Garratt (1991, cited in Mullins 2005) outlines the problem of senior leaders saying one thing, but doing another, and although they often say that ‘people are our principle asset’, they do not regularly behave that way. He further argues that in order for an organisation to learn, and create a climate conducive to learning, there has to be a willingness by leaders to foster learning on all levels of the organisation (Senge 1990), and to give up power, share leadership with leaders at all levels in the organisation, and ensuring that this happens across the organisation (e.g. McGill *et al.* 1992, Goh 1998, Mahoney 2000). In this view, leadership should not belong to a specific group of people at the top of the organisation only, but should be distributed to ensure that everybody can be accountable for leadership in his or her area. Distributed leadership will foster an environment where everyone can participate and contribute, and freely develop and share ideas and knowledge. Senge (1996) for example argues that the roles of Leaders as Designers, Teachers and Stewards should apply to leadership on all levels, and that hierarchical authority will not resolve today’s most prominent and pressing societal issues. He goes on to underline that learning organisations cannot tolerate people with traditional leadership perceptions, but have to be made up of a mix of different people, who can lead differently. This potentially touches again on the debate how ‘leaders’ are defined, and whether one subscribes to Senge’s view of ‘leaders on all levels’. This debate is outside the scope of this study, but as a reminder, and as outlined earlier in this section, this study views ‘leaders’ from a more hierarchical perspective, considering a more narrow group with specific manager and leader responsibilities at work.

Another frequently discussed area is the leaders’ mind-sets towards tolerating mistakes, and creating a climate of trust and openness (e.g. McGill *et al.* 1992, Tannenbaum 1997, Nevis *et al.* 1995). Within this line of discussion, in an environment where employees are not allowed to experiment, and where failure is consistently punished,

there will be no room for creativity and innovation. Leaders need to balance the pressure for high quality services and products with the need to let people make mistakes, if they want to foster a learning environment. This is thought to be especially important during induction and learning periods, when individuals are applying their newly learned skills (Tannenbaum 1997). Ottenbacher and Harrington (2007) came to similar findings, outlining the Michelin-starred chefs' willingness and demonstration to make trial and error a part of their regular daily routines in order to drive innovation and learning, and the importance of hospitality leaders to support the creation of such cultural norms supporting the innovation process (Ottenbacher and Harrington 2007: 456).

Another quality of leaders said to be important in a learning organisation context is the willingness to collaborate and share knowledge and learning (e.g. Senge 1999, Nyhan 2004). It is argued that leaders need to establish a supportive work environment, where they and everybody else is sharing their learning and is genuinely interested in the development of others. Leaders who hold back their knowledge in the mistaken believe that this will foster their individual power and authority, cannot be successful contributors in an organisation moving towards becoming a learning organisation. Along with this goes the leaders' attitude for self-reflection, the willingness and ability to seek feedback, and for accepting that everybody has room for improvement and learning (McGill *et al.* 1992). Or as Senge (1999) put it: *'To be a real learner is to be ignorant and incompetent'* (Senge 1999: 12).

Having the right mind-sets seems to be an important starting point for leaders, before any more hard skills, to be successful in an organisation that is aspiring to become a learning organisation.

Contingent view of leadership

Richardson's (1995) idea of situational leadership has been adopted by a number of other writers, who argue for a contingent approach to leadership. Being advocates of transformational leadership, Popper and Lipshitz (2000) for example note that leadership alone may not be enough to increase organisational learning, as other factors are at play as well, such as structural and cultural aspects. According to Hofstede (2001), people in more collectivist countries for example, such as Latin America, China

or Indonesia, tend to have a stronger attachment to their organisations, and some evidence suggests that, on average an individual's goal is often subordinated to the group's goal. This is in contrast with the more individualistic cultures of a number of Western countries, where individuals place more importance on their own achievements and personal rewards (Hofstede 2001). Within this context, transformational leaders, emphasizing the importance for subordinating individual needs to the group's or the organisation's need, would normally be more effective in collectivist cultures than individualistic or transactional leaders (Jung and Avolio 1999, cited in Popper and Lipshitz 2000).

Vera and Crossan (2004) look at the combination of transformational and transactional leadership, and argue that a number of external contingency factors influence top management's choice of leadership style, such as the environment, previous firm performance, and the stage of organisational life. In their view, transactional leadership for example may be more appropriate in times of crisis and high risk, whereas transformational leadership would a better choice in turbulent times where leaders need to motivate and influence stakeholders to overcome resistance to change.

As can be seen in the above section on 'leadership in learning organisations', most of the writings are rather prescriptive, and pragmatically concerned with roles, skills, styles and attitudes that will foster organisational learning and contribute to the creation and maintenance of a learning organisation. With the exception of a few, this prescriptive literature makes only little reference to contingent factors of leadership, and seems to assume that leadership skills are fairly general for learning organisation leaders. But when looking at the concept of the learning organisation, and the fact that most of the literature describes it as a 'journey' or 'transformation' towards becoming a learning organisation, then it seems likely that every organisation will be faced with different, individual challenges on this journey. Some organisations may need to overcome conflict-inducing internal power relations, whereas others need to create a new vision. Coopey (1995) for example draws attention to political activity in learning organisations, and uses Glidden's framework of structure and agency to outline the issues of power, control and regulated access to knowledge in learning organisations. Such issues will require different skills, knowledge and abilities of leaders to be successful. Every organisation will be different, will have to take a different path in order to move towards this 'ideal' of becoming a learning organisation, and may need

different leaders with different leadership skills to get there. The other question that one has to ask is whether leadership skills would differ between the CEO and top management, and the leaders and middle managers across the organisation? Are different skills needed for those leaders who are building and structuring the learning organisation, versus the ones that will be contributing and maintaining it?

Thus, what the literature suggests is that the impact that leaders can have on the creation of a learning organisation can therefore either be constrained or enabled by the broader organisational environment, and a whole range of different managerial or leadership skills are likely to be necessary. It is important to obtain a better understanding of how the specifics on an organisational context impact upon the skills, values and attributes required of leaders in the movement towards becoming a learning organisation. In this sense, this is one of the areas in which this study aimed to make a contribution. Extending the line of argument presented by the authors outlined above. Recruiting and developing the right leaders with the right knowledge, skills and abilities, or developing those skills in existing leaders, will be a crucial activity for learning organisations.

Going back to the example of the Swiss Postal Service highlighted in the Introduction chapter: we might ask what kind of leaders should the organisation have hired, and what skills, roles or mind-sets should they have, or have developed, to make the organisational development interventions more effective and fruitful?

Conclusion

The relevant literature presents a picture where the drivers for organisational learning and the learning organisation have not changed much over the past three decades, and one could argue that they have become even more important in view of the further accelerated pace of technological advances, the even more globalised world of today, and the general uncertainty the global economic crisis created over the past years. This study therefore started from the position that, in light of these heightened uncertainties, the learning organisation is still a pertinent concept – perhaps more so than ever before – given its professed focus upon the capacity of organisations to adapt to change.

As presented earlier, the literature in the area of the learning organisation is mainly prescriptive, and a number of frameworks are available. The review narrowed down the choice to three main writers, considering the learning organisation frameworks of Senge (2006), Pedler *et al.* (1997) and Watkins and Marsick (1993), along with the seminal work on organisational learning by Argyris and Schön (1978). Senge's (2006) approach to the concept of the learning organisation is built on five dimensions that are vital to build organisations that can truly learn, which he calls the five disciplines. Pedler, Burgoyne and Boydell (1997) have looked at the concept of the learning organisation from a more European perspective, and have given the concept a less mechanical meaning by changing the terminology of 'organisation' to 'company'. The learning company is described as a journey, with a number of maturity stages, based on eleven characteristics that need to be developed on the way. Watkins and Marsick's (1993) model is not very different from the other two, emphasising the importance of continuous learning, participation, empowerment and autonomy. They also reiterate that the learning organisation is an ideal, and a never-ending journey. Argyris and Schön (1978) look at the concept from a process perspective, and describe how learning on a different level fosters organisational learning. A variety of framework are available, and there is still little consensus on a common definition of either organisational learning or the learning organisation. For the purpose of this study, the approach of Watkins and Marsick (1993) will be used to frame the learning organisation context. It represents a very comprehensive and integrative framework of the learning organisation (Yang *et al.* 2004), with a clear distinction between the levels of learning, and with a measuring tool that was developed and validated based on several years of research (Tsang 2003). The

research also takes the stance that the learning organisation is not a definitively achievable outcome, but a goal towards which organisations should strive if they aspire to cope with continuous change.

There is also little consensus in the literature regarding how to measure organisational learning or the learning organisations, with a number of writings not only using different frameworks, but also looking at them from different perspectives. Several instruments have been developed over the past years, some with tested levels of validity and reliability (e.g. Tannenbaum 1997, Watkins and Marsick 1998), and others that remained untested. In view of using the learning organisation framework of Watkins and Marsick (1993), this study also benefits from the 'Dimensions of the Learning Organization Questionnaire' developed by the same authors, designed to measure an organisation's learning culture. This will inform the quantitative aspect of this research, establishing baseline data about the current situation of the case study organisation used.

The importance of leadership has been emphasised by a number of writings, describing a number of different, but also overlapping leadership roles, skills and styles, as well as leadership mind-sets conducive to organisational learning or the development of a learning organisation. There are some common themes that can be identified, but there is still little consensus of what makes a successful leader in a learning organisation. The literature is also not very clear about the distinction between skills of senior leadership, or an organisations CEO, and other managers and leaders across the organisation. In addition, only few writings seem to address the 'contingent' nature of leadership, based on a number of organisational and environmental factors. Coopey (1995) for example draws attention to political activity in learning organisations, and uses Glidden's framework of structure and agency to outline the issues of power, control and regulated access to knowledge in learning organisations. Such issues may well require different skills, knowledge and abilities of leaders to be successful. Another example is Richardson (1995), who explores the variations of skills needed by a learning organisation leader based on the learning context within the respective organisation. He argues that organisations with more self-organizing learning networks need leaders with softer, more political, social and cultural approaches; whereas organisations with a more classically administered and directed learning context require more skilful and planned approaches. He also concludes that in a successful learning organisation, leaders will

require to pay attention to both the hard and soft learning contexts. And as a last illustration of the ‘contingent’ view of leadership, although Bass (2000) argues that the successful leader should adopt transformational leadership to create and maintain a learning organisation, Vera and Crossan (2004) explored the impact of different leadership styles on organisational learning, in particular focusing on the role of the CEO and top management in an organisation. They concluded that different leadership styles, in their context either transformational or transactional, could be successful to drive organisational learning depending on a number of contingency factors, such as the political or economic environment, past business performance or the stage of organisational life.

The impact leaders and managers can have on the creation of a learning organisation can therefore either be constrained or enabled by the broader organisational environment, and a whole range of different managerial or leadership skills are likely to be necessary. Based on this insight, this study will attempt to answer a number of research questions:

- *What barriers and challenges do leaders within the hotel industry face in the process of moving towards becoming a learning organisation (e.g. politics, resistance to change, organisational culture, other leadership, lack of commitment, funds, etc.)?*
- *What leadership skills are conducive to the creation of the conditions and structures characteristic of a learning organisation within the hotel industry?*
- *Are those leadership skills influenced by the wider organisational context (e.g. culture, power relations and organisational structures) or environmental factors (e.g. economy, competition)?*

But there also is a strong sense that the concept of the learning organisation suffers from a number of conceptual flaws. The rather prescriptive literature of the learning organisation for example argues that there is a need for all organisations to embark upon the journey of becoming a learning organisation, but there are a number of organisations that are not looking to compete based on the ‘high skill / high quality’ model, and that are therefore not seeking continuous improvement and innovation (see e.g. Ashton and Green 1996, Keep 2000, Keep and Rainbird 2000). In some organisations, the current structure may not allow for the creation of a learning organisation (e.g. Keep and

Rainbird 2000), in others the culture and climate may put additional barriers to organisational learning in place (e.g. Eraut *et al.* 1997, Slater and Narver 1995). Another problem, particularly with Senge's (2006) view of the learning organisation, is the reification of the organisation, presenting the abstract concept of an organisation as a concrete entity that has '*...an existence beyond the level of the individuals who are the units of its constitution*' (Hughes 2000:9). Overall, it is therefore important to consider the broader organisational context and potential institutional environment, in which organisations are operating, as these are often neglected in the classical learning organisation literature. It is important that one is aware of these potential limitations that might impact the work of academics and practitioners, in particular when examining relationships between variables such as leadership skills and the learning organisation. This research therefore does not assume a unitarist view that all organisations should become learning organisations, but looks at a case study organisation that has embarked on the journey of becoming one, and uses a learning organisation framework in order to assess what skills can help leaders to create the conditions and structures characteristic of a learning organisation.

- *How successful have leaders in the case study organisations been to overcome some of the barriers and critiques raised about the concept of the learning organisation?*

Reviewing the literature about organisational learning and the learning organisation in different cultural and industry context also shed some light on the potential applicability of the concepts. Although the concepts seem to have been accepted in a number of countries, some of the above critiques were also related to the suitability in certain contexts such as the UK, where only few organisations consider it a useful tool due to more industrial-relation based approach to human resource management (Keep 2000), and Germany, where the learning organisation concept is a contrast to the local traditional VET system (Fischer 2003). On the other hand, a number of learning organisation frameworks were successfully tested and validated in other countries, such as for example in Asia (e.g. Song *et al.* 2009), continental Europe (e.g. Chiva-Gomes 2004) and the Middle East (e.g. Jamali and Sidani 2008). More concerning here was the limited evidence of the concept's applicability in the hospitality industry, and in particular in the context of the hotel industry where the case study organisation is

positioned. More research into different areas of organisational learning and the learning organisation, such as leadership, would assist in developing a more complete model of the learning organisation for the hospitality, and in particular the hotel industry. This raises another set of research questions this study will attempt to address:

- *Is the learning organisation a concept that can be applied to the hotel industry? How useful is it, and would the concept be according to 'text book'?*
- *Are the leadership skills that are conducive to the development of a learning organisation different in the hotel industry then they would be anywhere else?*

The different models of the learning organisation have similar characteristics, with most of them addressing the areas of individual and organisational learning, suitable structures conducive to learning, participation and empowerment, knowledge transfer and sharing, and the importance of leadership (Phillips, Watkins and Marsick 1996). Leaders are expected to drive learning by putting structures in place, sharing knowledge, empower employees and overall assist in creating a learning culture (Pedler *et al.* 1997). The learning organisation literature adopts a more unitarist view of what leaders and what leadership approach is successful, but there is little research available on how leadership skills may differ depending on the wider organisational context in an attempting learning organisation:

'The learning organization literature does not give sufficient attention to the type of individual which is suited to a learning organization. There is clearly a need for employees who have the appropriate level of psychological maturity to be reflective. The potential to develop these and other attributes in employees is significantly ignored. It is argued that such attributes are difficult to develop even in organizations where employee development initiatives put an emphasis on collaboration' (Garavan 1997: 27).

The contribution of this research will be helpful for practitioners, especially in the hotel industry, as well as the wider hospitality industry, as recruiting the right leaders with the right skills, and further developing those skills, will ensure that the various models of the learning organisations can actually be applied successfully within the respective organisational context. This research is based on a case study of a large global hotel company, examining the lessons learned (and still learning) of an organisation on its

journey towards the learning organisation model – with its success, challenges, problems, failures and potential culture change along the way.

Chapter 3: Methodology

Introduction

Different writings on social research design and theory follow slightly different approaches to the establishment of a research philosophy (e.g. Tuli 2010, Fleetwood 2005, Blaikie 2010, King and Horrocks 2010), but there is general agreement that everything starts with the research topic and subsequent questions. The structure of this methodology chapter will follow the recommendations of Blaikie (2010), starting with the research questions and their purpose, informing an initial overall research strategy. The various social science research strategies also differ in their ontological and epistemological assumptions, which are subsequently addressed. After having taken a stance within this philosophical debate, research methods and design are discussed in more detail, along with the respective justifications and reasoning for their use. The second part of this methodology chapter will cover other important topics, such as the actual research setting with additional information on participants, as well as a more detailed description of the data collection process, of the instruments used, and of the data reduction and analysis process. The chapter will finish with the intended contributions and possible limitations of this study, and considerations of potential ethical issues.

Research Strategy

The literature review was conducted in order to establish the rationale for this study, as well as to develop the research questions to be asked. The review helped in identifying what is already known about the research topic, what the patterns are, and where one could see potential gaps or ambiguities in the literature. A number of research questions were identified, and marked a fundamental starting point for this research (Blaikie 2010).

The next step was the choice of a research design, or the overall research strategy. Four broad research strategies can be identified in the social sciences, which can be used by themselves or in combination: inductive, deductive, retroductive and abductive (Blaikie 2010). This research is seeking to promote a fine-grained understanding of the relationship between leadership skills, organisational context and the development of a learning organisation. Therefore there was a need to obtain a detailed, contextualised

understanding of these complex relationships, thus arguably promoting an inductive, qualitative approach.

Philosophical Perspective

Along with the choice of research strategy, ontological and epistemological assumptions need to be made explicit as well, as they impact the choice of methods of data collection, analysis and interpretation of results. The research questions involve ‘critical realist’ ontological assumptions about what kind of things exist, in this case the relationships between human-created constructs, such as leadership skills and the learning organisation. Critical realism is a perspective that takes into account some of the ‘realist’ view that beliefs and behaviours are partially influenced by underlying social or economic structures, and would take account of such structures when interpreting social reality (King and Horrocks 2010). Reality in critical realism is seen as ‘stratified’, consisting of three domains ranging from the *empirical* domain (what can actually be observed), through the *actual* domain (what can exist independently of what can be observed), to the *real* domain (underlying structures and mechanisms that may not be readily observable) (Blaikie 2010: 93). Critical realism acknowledges that on one side research can use causal language as advocated by positivism, and on the other side also acknowledges that social phenomena are meaningful and need to be understood (Sayer 2000).

In line with the critical realist ontological perspective, and based on the aim of answering the research questions through interpretive inquiry rather than statistical generalisation, an ‘inductive interpretive’ epistemology, which is situated on the phenomenological side of the scale, was deemed appropriate for this study. This approach is oriented towards an inductive process of discovery, fostering a deeper understanding of the social phenomenon examined (Tuli 2010).

Following the critical realist ontological view, and the ‘inductive interpretive’ epistemological perspective, this research followed overall a qualitative-dominated mixed methods approach. This methodology enabled the researcher to elicit meaning that is embedded in the participants’ experiences, mediated through his own perception (Tuli 2010).

Method and Design

Three sets of concerns are important when choosing research methods: philosophical/epistemological, substantive as well as practical concerns. The epistemological/ontological debate, as outlined in the previous section, informs one's choice of methodology, methods, research design and implementation. Epistemological concerns in part address the question of whether the research should be more qualitative or quantitative. Substantive concerns address more the subject matter, and whether a methodology chosen matches the subject matter and research question. Research in organisational learning has been approached from multiple perspectives and by different disciplines. A number of studies based on the prescriptive literature of the learning organisation, looking for example at relationships between variables such as emotional intelligence or job satisfaction and organisational learning capabilities, are based on quantitative approaches (e.g. Scott-Ladd and Chan 2004, Chiva 2004, Chiva and Alegre 2008). Other studies, investigating the actual process of organisational learning, are based on more qualitative approaches (e.g. Argyris and Schön 1978, 1996). A combination of both is also possible, drawing information about both the process of organisational learning and the pre-conditions for organisational learning (Lahteenmaki *et al.* 2001). The third set of concerns is about the practicality of methods chosen based on resources and time available. Questions will have to be asked in regards to the scope of the research question, time availability, sample access, data analysis and ethical issues. According to Anderson (2004), from a practical point of view the best-suited research strategy for human resources practitioners undertaking a research project over a limited timescale is the case study method. Advantages include easier access to data collection, potentially using one organisation only, as well as the breadth available in methods of data collection. However, case study research can also have its disadvantages, resulting in large quantities of qualitative data that may be difficult to analyse, the difficulties around 'generalisation' of findings, and the potential influence of inside-research (Anderson 2004: 53). A similar argument for the choice of case studies based on practical concerns was presented by Blaikie (2010):

'... that case studies are suitable for single-person research on a limited budget, and that the study of one case provides a manageable opportunity for a

researcher to study one aspect of a problem in some depth within a limited time-scale' (Blaikie 2010: 187).

Based on the above philosophical/epistemological, substantive as well as practical concerns, and to address the research questions, the research design chosen therefore is a two-phase, embedded single-case study, starting with a quantitative-dominated phase using a survey questionnaire to establish baseline information about the case study organisation and its approach to organisational learning, and document analysis, followed by a qualitative phase using structured interviews and focus groups based on the critical incident technique (Flanagan 1954). Each phase of this design is separate from the other, and will take place in sequence (see Table 7).

Case Study	Phase 1	Survey
		Document analysis
	Phase 2	Semi-structured interviews
		Focus groups

Table 7 - Framework

According to Yin (2009), the choice to use a case study design depends in large part on the research questions, especially if answering the research question is requiring extensive description of a social phenomenon. A second reason for undertaking case study research is that it allows a researcher to retain the meaningful characteristics of real-life events, such as managerial and organisational processes when studying leadership in learning organisations. Yin (2009: 18) defines the scope of a case study as:

'... an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident'.

As this study is looking at leadership in learning organisations, and specifically considers the impact of contextual factors on leadership, it is important not to deliberately separate the phenomenon from its context, but to understand a real-life phenomenon within its organisational context.

Case study design potentially distinguishes between four types: single-case and multiple-case designs, and holistic and embedded types for each design (Yin 2009).

Although not fulfilling all of Yin's (2009) rationales for selecting a 'single' case study, this design was chosen primarily due to practical concerns around available time and access to research settings. Having selected the single-case study design, the next question was whether the research would involve more than one unit of analysis. Although the case study is about a single organisation, answering all the established research questions will require an analysis that will include outcomes about different levels of employees, being located in different parts and functions of the organisation. According to Yin's (2009) classification, this research therefore follows an 'embedded' single-case design.

The objective of the first, more quantitative-dominated phase of the research was to establish the extent to which the case study organisation is indeed an organisation that is on a journey towards becoming a learning organisation, therefore having the conditions and structures characteristic of a learning organisation. The research in this phase was based on document analysis to ascertain the organisation's professed strategy of becoming a learning organisation, as well as the results from an existing, tested and established quantitative survey measurement tool to confirm the extent to which this organisation actually was perceived by its employees to be a learning organisation.

In order to answer all the research questions, the second phase of the research adopted a qualitative case study methodology. Ellinger *et al.* (2005:6) note that:

'Surveys may be followed by fieldwork or interviews to deepen understanding, provide rich description, or test alternative explanations for a phenomenon.'

Data were collected through qualitative interviewing, using the 'critical incident technique' (CIT), defined by Flanagan (1954) as:

'... a set of procedures for collecting direct observations of human behaviour in such a way as to facilitate their potential usefulness in solving practical problems and developing broad psychological principles.' Flanagan (1954: 327)

In this semi-structured interview process, CIT was complemented by a number of open-ended questions with the purpose of addressing all the research questions. A

standardised open-ended interview guide was prepared, and customised to the level of the participants (see Appendix 5).

Setting and Participants

The selection of the case study was based on finding an organisation that had explicitly expressed its intention of becoming a learning organisation, and was in the process of implementing measures aimed at achieving that intention. Another selection criterion was the accessibility to the researcher for the purpose of reviewing documentation, conducting interviews and administering surveys; the selected case study organisation immediately fulfilled all of the above criteria, pending determination through this research how far it had succeeded in attaining the learning organisation goal.

The Case Study Organisation

The context of this research is situated in the hospitality industry, and in particular in the international hotel industry. The case study organisation is a global hotel company with widely recognized brands, and an expressed commitment to innovation, developed over their more than fifty-year history. The company manages, franchises, owns and develops branded hotels, resorts and residential and vacation ownership properties around the world. As of September 30, 2013, the company's worldwide portfolio consisted of 535 properties, and more than 95,000 individuals work at their corporate and regional offices and managed, franchised and owned properties in 47 countries around the world.

The organisation was founded in 1957 when the founder purchased a motel adjacent to the Los Angeles International Airport. Over the following decade, the company grew into a North American management and hotel ownership company, which became a public company in 1962. In 1968, an international sister company was formed by the main stakeholder's family business interests and subsequently became a separate public company. The two sister companies were taken private again by the founder's family business interests in 1979 and 1982 respectively. In 2004 all of the hospitality assets owned by the founder's family business interests, including the two sister companies, were consolidated under a single entity. In 2009, the company completed an initial public offering, and in connection with the offering, part of the company's stock began trading publicly on the New York Stock Exchange.

The case study organisation also presented itself as an appropriate site for this research due to its professed commitment to innovation. The company claims to pride itself on its enduring aim of committing to continuous innovation in service provisions, facilities, etc. As one example of this, it points to the fact that more than forty years ago, they opened the first ever large-scale atrium lobby hotel. This was both an architectural icon as well as a highly functional hotel property that provided the organisation with an entry into the large-scale convention market. The organisation also points to the fact that it recently added a dedicated innovation function with representation at the highest level of the organisation with the stated aim of ensuring they continue to use what they know about their guests to create the best guest experience for each of their brands. In addition, they launched two new brands in 2006 and in 2007, each of which features an internally developed service model that seeks to eliminate a number of de-personalised aspects of the hotel experience. In 2011, they launched another new brand, a revitalized extended stay concept that was designed based on insights gained from guests who frequently utilise hotels in the extended stay segment. It is quite clear that the organisation sees itself as an innovative and adaptable one – thus potentially providing a useful site for exploring dimensions of the learning organisation.

In mid-2011, the case study organisation's Chief Executive Officer appointed a Chief Innovation Officer, whose role was to implement innovation in order to differentiate the company's brands from its competitors. Some work was done with the School of Design at Stanford University, who assisted the organisation in rolling-out an 'innovation by design' process, which became a methodology for innovation that combined creative and analytical steps, requiring collaboration across functions and disciplines. Since its original launch in early 2012, the design-thinking process went through a number of iterations, and was presented to the leadership of the case study organisation in the format as outlined in Figure 2 below (the terms used in the figure are explained in the next chapter).

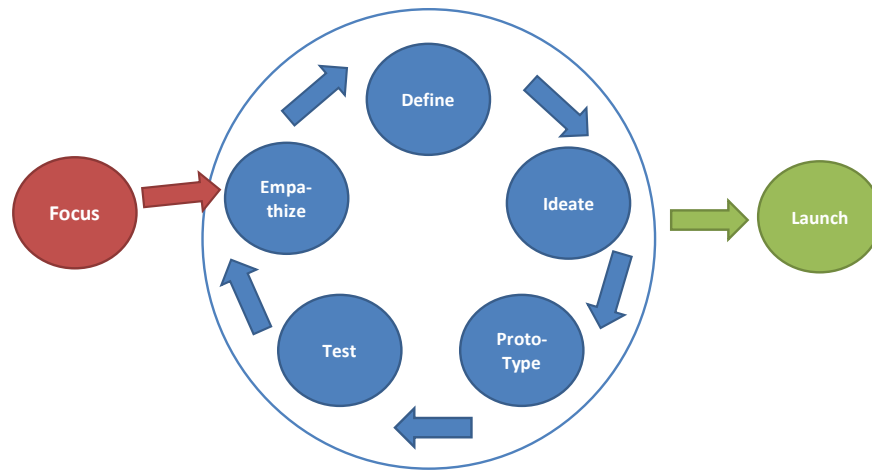


Figure 2 – The Design-thinking process

Within the case study organisation, eight hotels were identified to serve as ‘Lab hotels’ (laboratory hotels⁶), where this design-thinking process could be launched and tested. Four hotels were located in the United States, and four hotels outside of the United States, namely in Brazil, India, Hong Kong and the United Kingdom. The integration of the above process in the day-to-day activities in those hotels aimed at a considerable paradigm change: increased employee participation, empowerment at all levels, fostering a culture of listening before acting, and continuous learning. All in all, the aim was to integrate a learning process similar to what Argyris and Schön (1978) called ‘double-loop learning’.

The researcher planned to conduct this study within the above-mentioned eight Lab hotels, where the design-thinking process had already been rolled-out, allowing the researcher to focus on the previously identified research questions, within an environment where the relationship between organisational learning, learning organisation and leadership had been made visible to investigation by the design-thinking process and therefore could be readily examined. Access had been granted to the researcher to conduct research within the organisation, but was limited to the population of ‘owned’ hotels only. The case study organisation has properties that are owned, where employees are employed by the case study organisation, but also has properties that are either managed or franchised, where employees are employed by

⁶ The term ‘Lab hotel’ or ‘Lab’ will be referenced to on several occasions in this study.

different legal entities. For both legal and practical reasons, access had therefore been granted to all areas of the organisation where employees were actually employed by the organisation.

In addition to the case study organisation's Corporate office, three owned Lab hotels located in the United States were subsequently selected as research settings for both phases of the study, i.e. the survey, document analysis, focus groups and individual interviews. The case study organisation's Corporate office employs about 800 employees across a number of levels and functions such as operations, brands and marketing, finance, legal, development and human resources. Lab hotel 1 is a larger airport hotel, with an employee base of 550. Lab hotel 2 is an upscale city-centre property employing 360 employees. Lab hotel 3 is a business hotel, located in the busy Silicon Valley, employing 300 employees. The researcher used the experiences of the participants in those four locations with the new design-thinking process, to ask for critical incidents where specific leadership skills either helped or hindered the process.

Participants

According to Yin (2009), the research objects in a case study are usually called 'participants'. For both phases, participants were chosen based on a non-probability sampling approach, and in particular a convenience sample due to the selection of a case study research method. Although a non-probability sampling approach is usually less desirable in quantitative research, where the researcher is looking for generalizable results, it is more accepted in qualitative research where samples are characteristically smaller and sample composition is not impacted upon by the need to meet statistical thresholds. However, as noted below, attempts were made to ensure that the sample did include a range of participants. More extensive theory-building from the results from one case study may be limited, but can still be achieved through analytical induction through additional case study research reproducing similar results as outlined by Lindesmith (1968, quoted in Blaikie 2010: 196).

Getting access to participants was a fairly straightforward process for the researcher, due to his knowledge of the organisation and the various internal networks through which participants were contacted. Considering this overall sampling paradigm, a purposive sampling method was used, looking at participants that fit into the following

categories: expert sampling, quota sampling and language. For expert sampling, participants were selected that either worked in one of the case study organisation's 'Lab hotels', or had been involved with the setup of such a 'Lab hotel', or had attended any of the multiple design-thinking ⁷ sessions that were conducted in a hotel or office. For quota sampling, participants were then selected on the base of demographic diversity, such as their work location (hotel vs. corporate), different levels (Vice Presidents, General Managers, Leadership Committee members, Department Heads and Middle Managers). As the survey for example included questions about the perceived financial performance of the case study organisation, no participants below Manager-level were selected, as they would not have access to the information required to complete much of the questionnaire. As the research was conducted in the Corporate office and three hotels located in the United States, there was no need to adjust the sampling for language consideration. The same sampling approach was used for the selection of participants in both phases of the research, i.e. the survey, focus groups and individual interviews. At the Corporate office the survey was sent to fourteen individuals on Vice President and above level across different functions. The six participants from the Corporate office interviewed during the qualitative phase of the study were selected out of the same group and, for context purpose, had all completed the survey before the interview. In the three Lab hotels, 95 surveys were sent to a broader group, which included middle-managers and senior hotel leadership. All interview and focus group participants were subsequently selected out of this same group, although having completed the survey was not a prerequisite.

In phase one of the research, the quantitative-dominated phase which aimed at assessing whether the case study organisation was indeed an organisation on the journey of becoming a learning organisation, or a 'learning-oriented' organisation as described by Ellinger and Bostrom (2002), the target was to obtain 50 questionnaire responses. Assuming a 60-70% completion rate, around 100 invitations were sent out to

⁷ Design-thinking sessions were a training course (change initiative) that the case study organisation had put in place to encourage participants (mainly Vice Presidents and above in the Corporate office, and senior leadership and middle-managers in hotels) to use different problem solving techniques based on Stanford University's design-thinking model. The purpose of introducing design-thinking was to foster organisational learning and innovation across the case study organisation's business units.

participants at the organisation's corporate headquarters and in three selected, owned business units (Lab hotels) where employees are employed by the organisation.

Out of 109 survey links sent out, 72 were completed representing an overall response rate of 66%. This was in line with the numbers anticipated during the setup of the survey. Table 8 shows the details about number of respondents, what levels or roles they were in, and the respective participation rates by group and overall.

	Case Study Organisation				
	Hotel		Corporate	Not identified	Total
	Middle Managers	Senior Leaders	VP and higher		
Surveys administered					
Lab hotel 1	20	8			
Lab hotel 2	21	8			
Lab hotel 3	30	8			
Corporate office			14		109
Surveys completed					
Completed	39	18	13	2	72
Response Rate	55%	75%	93%	N/A	66%

Table 8 – DLOQ survey participation

In phase two of the research, the qualitative phase where the researcher assessed participants' beliefs about leadership skills in learning organisations and their perceptions of the learning organisation concept overall, as well as the potential impact of organisational context on what those skills should be, a similar approach to sampling was taken. This meant that participants were leaders from different levels, working in different functions and contexts in the organisation. 12 participants were selected for qualitative interviews: the 6 of them out of the Corporate office group were part of the 13 that had previously completed the survey, and out of that group had agreed to an individual interview. The other 6 were the General Managers and Human Resource Directors from each of the 3 Lab hotels, who were initially driving the design-thinking process at their properties. It was anticipated that at least 10 participants would agree to the interview, which took between 60 to 90 minutes. Interviews were all taped, and later transcribed verbatim. To maximize the time available, the researcher also decided to conduct two focus groups: one with middle managers, and one with more senior

managers in a hotel. 20 participants were invited: 7 middle managers attended the first session, and 6 senior hotel leaders the second session. Both groups represented a good mix of functions and gender within the hotel, but the sample was still purposively selected, to have the right experts within the focus groups. A breakdown of the samples for interviews and focus groups is presented in Tables 9 and 10 in the next section.

Once participants were identified, the researcher used his knowledge of the informal internal networks to get in touch with them. All participants in both phases received an invitation, with more details about the research as well as about some of the theoretical concepts discussed. The invitations for the interviews also included some information on the interview technique used, asking participants to think about a number of ‘critical incidents’ related to leadership during the rollout of the design-thinking process at their hotels. A consent form was also signed by all participants that attended an individual interview or a focus group (reference Appendix 7).

Instruments and Data Collection

Yin (2009) argues that in a case study evidence should be collected from multiple sources, in order to increase construct validity and reliability of the case study research. This study therefore took advantage of a number of proposed sources of evidence as well, such as documentation, archival records and a survey as part of first phase of the research, and interviews and focus groups as part of the second, more qualitative phase of the research.

In the first, more quantitative-dominated phase of the case study, the ‘Dimensions of the Learning Organisation Questionnaire’ (DLOQ) developed by Watkins and Marsick (1997, 2003) was used as a means of assessing the organisation’s progress towards the learning organisation model (as defined by Watkins and Marsick). This was seen as a necessary precursor to the main phase of the research, which (in accordance with the research questions) aimed to investigate the role of leaders and leadership in an aspiring learning organisation. The DLOQ is an established tool that has been validated in a number of settings (e.g. Ellinger *et al.* 2003 for the use within a business context) and across a number of countries (e.g. Jyothibabu *et al.* 2010, Song *et al.* 2009). According to the literature, both their learning organisation model as well as the measuring instrument developed out of over sixteen years of practice and research, were regularly tested, validated and modified again through a number of research studies (Marsick and Watkins 2003). The DLOQ was designed to measure an organisation’s learning culture, based on seven dimensions of a learning organisation addressing learning on individual, group and organisational level (O’Neil 2003). Considered as one of the more comprehensive questionnaires (Moilanen 2001), it has an empirically tested background, and covers the concept of the learning organisations very broadly. To obtain permission to use this tool, the researcher contacted Karen Watkins and Victoria Marsick directly. Permission to use the survey and to make some minor customisations to fit the tool to the case study organisation and environment were granted. In the survey, the word ‘my organization’ was changed to the name of the case study organisation; in addition, the researcher added some additional demographic questions relative to the case study organisation and some additional questions about the ‘perceived value of the learning organisation concept’. Karen Watkins also sent the researcher their latest norms of the ‘Dimensions of the Learning organisation

Questionnaire' (dated May 2012) against which to compare the case study organisation's results. This allowed the researcher to interpret the difference within the seven dimensions of the learning organisation based on benchmarking the results to the above norms, and considering the detailed scale description by O'Neil (2003), with the aim to assess whether the case study organisation was indeed an organisation on its way to become a learning organisation. A blank copy of the DLOQ used in this study is attached (Appendix 3).

In addition to the original 55 questions of the DLOQ, the following additional questions were added to ensure participants were indeed familiar with the organisation's new design-thinking process:

- *Which of the following categories best describes your employment with the organisation?*
- *Are you based in a Lab hotel?*
- *If 'Yes', did you attend any of the 'Innovation and Ideation Sessions'?*
- *If 'No', have you attended any of the 'Innovation and Ideation Sessions' in one of the hotels or offices?*

The following questions were added as well to collect limited quantitative information in view of better answering some of the initial research questions:

- *Having completed the above 'Dimensions of the Learning Organization Questionnaire', how relevant or valuable do you feel are those questions to the hospitality industry in general?*
- *How relevant or valuable are they to [case study organisation]?*

The survey was conducted in three Lab hotels of the case study organisation, targeting both middle managers and more senior leaders in each unit, as well as in the case study organisation's Corporate office. The survey was therefore conducted within the same population, from where the individual interview and focus group participants were sampled. The survey was delivered in an on-line format following the exact 'Dimensions of the Learning Organization Questionnaire' format, using the Survey Monkey platform. The survey link was subsequently sent to the Human Resources departments of the three Lab hotels and forwarded to their middle and senior managers in the respective hotel via distribution list. Additional invites to complete the survey

were sent to a selection of senior leaders at the Corporate office, targeting individuals who had previously been involved with the work of the Lab hotels and the rollout of design-thinking. Each e-mail invitation contained not only the link to the survey, but also a short introduction to and overview of the research project (see Appendix 4).

In addition to the quantitative survey, the researcher also looked for evidence that the organisation's learning-orientation was not solely rooted in its rhetoric, but actually translated into real events, strategies and activities. Such evidence also included internal communications, reports, previously collected survey data and other organisational records (Yin 2009). Although organisations are major producers of documentary materials, the researcher also recognised that documents don't often convey facts that can be presented as an objective reality but rather promote a particular point of view or perspective within and outside of the organisation (see Atkinson and Coffey 2011). Documents therefore can tell us something about how the organisation likes to present itself, but they cannot by themselves truly tell us how the organisation operates day to day. The purpose of the document analysis in this research was mainly to add weight and detail to the picture emerging from the above survey data.

For the qualitative phase of the research, a modified version of the critical incident technique was used for individual as well as focus group interviews. Both the individual and focus group interviews took place in a more conversational manner, and although a certain set of questions were followed, the format remained fairly open-ended (Yin 2009: 107). Following the description of critical incidents, revealing '*... how case study participants construct reality and think about situations...*' (Yin 2012: 12), the interviews followed a semi-structured form allowing case study participants to talk about a number of issues raised in the research questions. Participants, as mentioned earlier, were selected from both the case study organisation's Corporate office, as well as from three Lab hotels. 6 participants were from the Corporate office, and were selected due to their involvement with the launch of the design-thinking process in a number of Lab hotels. From the Lab hotels themselves, the General Manager and the Human Resources Director from each hotel were chosen for individual interviews, again because of their familiarity with this new process, as well as of their unique position from where they could observe how leaders either embraced or rejected the new approach to problem solving. The researcher did not manage to get an individual interview appointment with the organisation's Chief Executive Officer, but was able to

attend an interview that was conducted by the Chief Innovation Officer with the Chief Executive Officer, discussing the same themes around leadership, the implementation of design-thinking and innovation.

Interview	Date	Interview Type	Position	Location
Interview 1	1-Jul-17	Individual	VP - Learning & Development	Corporate office
Interview 2	19-Jul-12	Individual	General Manager	Lab hotel 2
Interview 3	19-Jul-12	Individual	Human Resource Director	Lab hotel 2
Interview 4	20-Jul-12	Individual	Human Resource Director	Lab hotel 3
Interview 5	20-Jul-12	Individual	General Manager	Lab hotel 3
Interview 6	17-Aug-12	Individual	VP – OL & LD	Corporate office
Interview 7	2-Aug-12	Broadcast	Chief Innovation Officer	Corporate office
Interview 7	2-Aug-12	Broadcast	Chief Executive Officer	Corporate office
Interview 7	2-Aug-12	Broadcast	General Manager	Lab hotel 1
Interview 8	11-Sep-12	Individual	VP – Rooms	Corporate office
Interview 9	12-Sep-12	Individual	VP - Food & Beverage	Corporate office
Interview 10	5-Oct-12	Individual	Human Resource Director	Lab hotel 1

Table 9 - Individual Interview Participants

The two focus groups were conducted in a very similar manner, using the dynamics of the focus group to get participants building on each other's comments. For practical reasons, they were both conducted within the same Lab hotel, with one focus group being comprised by participants on middle manager level, and the other focus group comprising more senior leaders in the hotel. All individual and focus group interviews were conducted by the researcher, and were taped and transcribed verbatim.

A case study and interviewing protocol was prepared, containing both the instruments as well as the procedures to be followed in conducting the case study. It also contained a set of questions to address while collecting data during individual interviews and focus groups, which were predominantly directed at the researcher in form of a mental framework (Yin 2012). Copies of the interview guides used (individual and focus group) are attached in Appendix 5. The guides ensured some level of consistency and structure during the conversations, still leaving enough room for more open-ended questions to elicit the necessary information from participants. The open-ended questions used were designed to spark conversations focusing on the topics of the research questions, such as leaders' behaviours during the rollout of the design-thinking process, or the learning organisation concept in the hospitality industry.

Interview	Date	Interview Type	Position	Location
Focus Group 1	23-Jul-12	Focus group	Banquet Manager	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Assistant F&B Manager	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Group Sales Manager	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Group Sales Manager	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Executive Housekeeper	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Front Office Manager	Lab hotel 1
Focus Group 1	23-Jul-12	Focus group	Convention Services Manager	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Director of Catering	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Director of Rooms	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Assistant Controller	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Director of Food & Beverage	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Executive Sous Chef	Lab hotel 1
Focus Group 2	23-Jul-12	Focus group	Assistant HR Director	Lab hotel 1

Table 10 - Focus Group Participants

Pilot study

The researcher conducted a pilot with two surveys, as well as with one qualitative interview, in order to test how well the questions and the topic overall were understood. The survey and interview participants were both from the Corporate office group, and their data was subsequently used as part of the research. This assisted in ensuring that clear answers could be collected in the quantitative part, and that no misunderstandings lead to unnecessary delays in the qualitative part. Part of the pilot study also was to consider whether both the quantitative and qualitative data could be processed as planned in NVivo, or whether different models or frameworks needed to be considered. Following the pilot survey and interviews, no changes were made to the survey questions or the interview guide, as both the context of the research and the subsequent questions were easily understood.

Processing and Analysing Data

Research designs usually deal with comparisons between groups with a number of variables. In a case study research, such as this one, explanations are achieved by analysis of variables within a case. A case study also does not strive for statistical but for theoretical generalisation (de Vaus 2001, Blaikie 2010, Yin 2009). The aim is therefore not a finding that is universally generalizable, but to come to a conclusion that would potentially be similar in other similar organisations. This means that even from just one case study, it might still be possible to say something significant about much broader academic themes and debates.

Survey and document analysis

The first phase of the research was designed around the objective to establish whether the case study organisation was indeed on the journey of becoming a learning organisation. This needed to be established, as it formed the basis of the research. Two methods were used: a survey and document analysis. Both methods based their analysis on the learning organisation model of Watkins and Marsick (1996), as detailed in Tables 11 and 12 below.

The ‘Dimensions of the Learning Organization Questionnaire’ (DLOQ) developed by Watkins and Marsick (1997), examining the seven dimensions of learning at individual, team and organisational level, was used as a survey tool. For the document analysis, the same framework of the learning organisation was used to categorise findings into the seven dimensions of a learning organisation and performance outcomes, allowing the researcher to look for evidence beyond the organisation’s rhetoric about its learning orientation. The researcher was looking in particular for actual policies, memorandums, company initiatives, processes, events, strategic documents and business plans, as well as of course the organisations mission statement.

Dimension	Definitions
Create continuous learning opportunities	Learning is designed into work so that people can learn on the job; opportunities are provide for on-going education and growth.
Promote inquiry and dialogue	People gain productive reasoning skills to express their views and the capacity to listen and inquire into the views of others; the culture is changed to support questioning, feedback, and experimentation.
Encourage collaboration and team learning	Work is designed to use groups to access different modes of thinking; groups are expected to learn together and work together; collaboration is valued by the culture and rewarded.
Create systems to capture and share learning	Both high- and low-technology systems to share learning are created and integrated with work; access is provided; systems are maintained.
Empower people toward a collective vision	People are involved in setting, owning, and implementing a joint vision; responsibility is distributed close to decision making to that people are motivated to learn toward what they are held accountable to do.
Connect the organization to its environment	People are helped to see the effect of their work on the entire enterprise; people scan the environment and use information to adjust work practices; the organization is linked to its communities.
Provide strategic leadership for learning	Leaders model, champion, and support learning; leadership uses learning strategically for business results.

Table 11 – The Dimensions of a Learning Organization

(adapted from Marsick and Watkins 2003: 139)

Key results	Definitions
Financial performance	State of financial health and resources available for growth.
Knowledge performance	Enhancement of products and services because of learning and knowledge capacity (lead indicators of intellectual capital)

Table 12 – Performance Outcomes

(adapted from Marsick and Watkins 2003: 139)

The survey took place between July 1 and 20, 2012, allowing participants enough time for completion. Raw data was subsequently downloaded into EXCEL for analysis, and the survey was considered closed on July 30. Upon completion of the survey, the researcher contacted again Karen Watkins, sent her a copy of the survey results in form of a graph, and asked for an updated normative data set to benchmark against. This was promptly provided by Karen Watkins, based on 46 of the 70 published studies using the 'Dimensions of the Learning Organization Questionnaire'.

The responses to the DLOQ were tabulated for all participants in order to determine the extent to which the case study organisation was perceived to possess the seven learning organisation dimensions and two organisational performance dimensions. Following the DLOQ model that scores questions from 1 to 6, higher scores indicated more positive perceptions of the adoption of principles characteristic of a learning organisation. In a successive step, means and standard deviations were calculated for each question and subsequently for each dimension and number of answers given for each question counted. All survey responses were considered for the results for each question, even if a participant did not answer all the questions in the survey. Questions that were not answered were left blank, and therefore did not affect the mean scores.

The questions were then grouped around the dimensions of a learning organisation and performance outcomes, in line with the framework presented above (Table 11 and 12), and average scores were calculated for each of the dimensions. Normative scores, as received by Karen Watkins in August 2012, were added to each of the dimensions and compared with the scores of the case study organisation. This therefore provided a normative benchmark against which the case study organisation's relative progress towards the learning organisation model could be established in advance of the main stage of data collection.

Although outside of the scope of this study, the above analysis was also undertaken for the different respondent groups: Hotel Middle Managers, Hotel Senior Leaders and Corporate office Senior Leaders. This allowed the researcher to compare scores in the seven dimensions plus the 2 outcome dimensions between the above three participant groups, the case study organisation overall and the respective normative scores. Once this comparison was established, the remaining questions added by the researcher to the survey were further examined as well.

Interviews and Focus Groups

As mentioned earlier, access to interview participants was fairly straightforward for the research, through the use of his internal networks and contacts. All individual and focus group interviews were audio recorded and transcribed verbatim, and data were subsequently systematically organised into categories, relationships and themes. Data reduction and analysis therefore went hand in hand, and a qualitative data analysis software (NVivo) was used. After having collected and transcribed the field data, the researcher started the coding process by breaking down the rich and descriptive data into suitable categories and sub-categories, and classified the information accordingly (Blaikie 2010). Thematic analysis was chosen to analyse the qualitative data from the interview and focus group transcripts. King and Horrocks (2010) stress the importance of defining what a ‘theme’ should be, and offer some helpful guidelines:

‘Themes are recurrent and distinctive features of participants’ accounts, characterising particular perceptions and/or experiences, which the researcher sees as relevant to the research question.’ King and Horrocks (2010: 151)

Themes usually imply some sort of ‘repetition’; in the context of this research ‘repetition’ refers to topics repeated across different interviews and focus groups, as well as within a specific transcript. Different styles of thematic analysis are available, and this research has used ‘template analysis’ to analyse the qualitative data and to organise themes accordingly. Template analysis according to King and Horrocks (2010) can be used with any size of study, but is especially well suited to a research such as this one with 10 or more hour-long interviews or focus groups. Using this approach, an initial template was constructed around a number of ‘a priori’ themes (see Table 13), based on the research questions developed in the literature review.

Code Level 1
Barriers to organisational learning
Case study organisation
Design-thinking process
Hospitality industry
Impact of leaders

Table 13 – Overarching Structure (a-priori themes)

This approach of defining some themes in advance of the analysis process ensured a focus on the ability to use the findings to answer those questions at the end of the research, without leading to a narrow-minded approach to analysis.

Following an iterative process, the template was further revised and additional themes added (see Table 14) as the researcher worked his way through the interview transcripts, but the same overall template was subsequently used to analyse all interview and focus group transcripts. Within template analysis, themes can be organised into several levels, ‘... with lower-level themes representing distinct instances or manifestations of the concept identified by the higher-level theme.’ (King and Horrocks 2010: 168).

Code Level 1	Code Level 2
Barriers to organisational learning	
	Barriers and challenges
	Corporate influence
	Leaders overcoming barriers
	Organisations overcoming barriers
Case study organisation	
	Commitment by senior leaders
	Culture of the organisation
	Leaders in the organisation
	Negatives
	New approaches
	Performance
	Structure
Design-thinking process	
	Document analysis
Hospitality industry	
	Leadership skills
	Learning organisation concept
	Other industries
Impact of Leaders	
	Influence of wider organisational or environmental context
	Leadership at all levels

Leadership skills – positive
Leadership skills – negative

Table 14 – Detailed Themes

The findings of the thematic analysis are described and discussed in ‘Results and Discussion’ chapter, following each overarching theme in turn, referring to examples and actual quotes from the transcripts with a focus on the more illustrative themes and codes that are most relevant to the research questions. To identify the most relevant themes and codes, all data was downloaded from NVivo into Excel, and a separate page was created for each a priori theme (see Appendix 6). Duplicate nodes were subsequently removed in case they were coded on both lower and higher levels, and a number of quotes were re-coded either into existing nodes or new nodes where further sub-themes could be identified. Each sub-theme node was then evaluated for its relevancy and importance, based on the number of references and sources. The nodes were subsequently colour-coded: green for those sub-themes that were frequently referenced from a number of sources, red for those that were also referenced frequently but from fewer sources, and no colour-code for those which were not considered equally relevant. Following the colour coding, all quotes within the selected nodes were reviewed and additional sub-themes within the node were identified where possible. Actual quotes were then selected to support those sub-themes. The quotes are embedded within an analytical narrative that will guide the reader through the findings, and will serve as signposts for a ‘compelling story’ (Braun and Clarke 2006, in King and Horrocks 2010:165). Themes were subsequently further refined and underlying evidence from all sources used to write-up a compelling case.

Ethical Considerations

Access to the research setting: Having selected a case study research strategy, the organisation selected for the study was the company the researcher was working in. Being a public company, the process of getting access to the research participants required the approval by the legal department, and implied a number of limitations. The researcher submitted a detailed proposal, being very open and honest about the fact that this research was linked to gaining a Doctorate degree with a UK-based university. The proposal also laid-out how the data was to be collected, analysed and stored, and what steps the researcher would take to ensure confidentiality and anonymity of participants. As access was granted promptly to the researcher, there was no need for additional information such as the potential benefit or return to the organisation by granting the researcher access to the research subject, but the researcher has planned to ensure that the organisation will receive a full report on the findings, with eventual recommendations for practice.

Although the organisation granted full and open access, this was limited to the entities where employees were directly employed by the organisation, which represent about 70% of the organisation's employee-base. Access to the other participants would have implied signing legal documents for confidentiality and data privacy with third-party owners and employers, which for practical concerns was not feasible. A contract was signed between the organisation and the researcher, outlining the confidential use of research data and results. The contract did not imply any other clauses, such as the review of the results before publications, or any other limitations.

Process of data collection in different countries: Due to the access restrictions to 'owned' properties only, the researcher for practical reasons decided not to include any research settings in other countries than the United States.

Obligations to funders and employers: The researcher had to make sure that confidentiality was respected when given access to privileged information – not only through qualitative interviewing, but also the documentary analysis. The objective of the research was not to analyse or research the organisation per se, but to study a social phenomenon within the setting of an organisation. The researcher did not foresee any potential attempt to compromise the research findings by dictating a certain outcome in

advance. To ensure that there was no risk of disclosing confidential or privileged information, the researcher shared a number of the key findings and an outline of the final report with key gatekeepers in the case study organisation, and asked for their feedback. Interestingly, some of those preliminary findings were actively used by the case study organisation (see ‘Conclusion’ chapter).

Obligations to subjects and research participants: According to the Social Research Association (2003), this is one of the most important ethical dilemmas when conducting insider-research. The maintenance of confidentiality for participants known to the researcher, and anonymity for participants that are unknown is crucial. It begun with the correct design of the research instruments, to ensure that the participants wasted no time and effort and that future research would still be possible in the same setting. In addition, it was important to look for readily available data before starting a new inquiry through a detailed literature review. Upon embarking on the research, the researcher made sure that informed consent could be obtained from the participants for any data collection, whether through the survey, focus groups or individual interviews. The British Psychological Society (2000) gives some useful guidance on how to obtain informed consent, such as providing adequate information about the purpose and nature of the inquiry, use of a consent form, and allowing participants to opt-in and out at any time. This was especially important as the main researcher was holding a senior position in the organisation. The consent form (see Appendix 7) therefore explicitly stated that this was an academic piece of research and not an obligation upon them as part of their work. In any case, participation should be voluntary, thus ensuring that employees are not reluctantly agreeing but rather enthusiastically participate. All participants were aware that they were participating in a research project, and they were provided with an adequate debriefing of the findings (The British Psychological Society 2000). The researcher also personally thanked every participant by sending them a personalised note following the interview or focus group. To address the potential ethical dilemma of misuse of data that might lead to identification of participants, the researcher ensured not to disclose identities. This only applied to the more qualitative side of the research, i.e. the interviews and focus groups. Results were grouped by categories, thus ensuring that they did not lead to the identification of individuals.

Data analysis, writing and storage: Any documents showing personal information concerning research participants, such as consent forms or invitation letters were kept

confidential by the researcher. All research data was stored in a secure manner, thus preventing data being published or released without prior consent. To mitigate the effects of participants' potential disagreement with the interview data collected, the researcher distributed copies of the transcripts to all interview and focus group participants and validated the information with them accordingly. As electronically stored data can potentially be compromised, and to further ensure confidentiality and anonymity, hard copies of questionnaires and transcripts were purged once the analysis was done.

Insider research: Although the fact that the researcher was using his own organisation as research setting potentially helped with the identification of participants and interpretation of certain results, potential issues such as limited access, position in the organisation, result focus and insider knowledge could come up. The issue of access was addressed in the first paragraph, outlining the necessary process. The position of the researcher in the organisation could potentially create an issue, especially for the more qualitative data collection. This was overcome by presenting the research clearly as a thesis for an academic qualification, and not as a work project sponsored by the organisation. In addition, the assistance of local Human Resource representatives was crucial, as at times they acted as proxies in the administration of questionnaires. The question of insider knowledge also had to be addressed, as the insider researcher needed to detach himself to a certain degree from the subject as his work place, but had to analyse and interpret the findings based on academic theories and principles. Being an insider researcher therefore has both its potential problems as well as its strength, which had to be balanced during the research.

Limitations

It is also worthwhile mentioning a number of limitations this study may have, in particular: the case-study design, sampling procedures, participant access and the role of the insider-researcher. The most common limitations stated with the case-study method are the method of selection of cases, as well as the way results can, or cannot, be generalised (Yin 2009, Blaikie 2010). Although the case used in this study can be classified as ‘typical’, no other potential cases were taken into consideration and therefore no case sampling took place. As for the generalisability of results, case studies strive for ‘theoretical generalisation’ rather than ‘statistical generalisation’ (Yin 2009, Mason 2009, Blaikie 2010), as outlined in the previous section of this chapter. Another potential limitation is the participant sampling procedure used. Due to practical concerns, and in line with how the research questions were to be answered, a purposive and expert sampling procedure was applied, which may limit more extensive theory-building from the results, and may require an ‘analytical induction’ through additional case study research coming up with similar results as outlined by Lindesmith (1968, quoted in Blaikie 2010: 196):

“... this logic begins with an initial investigation of a few cases, which leads to the formulation of a tentative causal hypothesis to account for the phenomenon. Additional cases are investigated to test this hypothesis, and this may lead to its reformulation’.

The sample used consisted mainly of middle managers and senior leaders in hotels and in corporate functions, based on the definition of ‘leaders’ outlined in the Literature Review chapter. This could also represent a potential limitation, if a different definition of ‘leaders’ is adopted (e.g. such as ‘leadership at all levels’, which would subsequently have a methodological impact as well).

The participant access, as outlined earlier, could also be considered a potential limitation, with access only having been granted to certain parts of the case study organisation. Also, for practical reasons as outlined earlier around understanding the ‘concept’ of organisational learning, interviews were conducted with participants on middle management and senior leadership level only. To gain deeper insight into the case study organisation, involving employees on all levels of the organisation, would

require a redesign of the methodology and research instruments. This could be a topic for further research.

Another potential limitation of this research is the fact that the researcher is an employee in a leadership position in the case study organisation, resulting in a number of concerns around insider research (Brannick and Coghlan 2007). A commonly held view is that those dual roles of investigating researcher and employee are not compatible (e.g. Morse 1968, quoted in Brannick and Coghlan 2007), but this paradigm can be overcome by respecting a high quality of research design and application, consistency in data collection, processing and analysis. Addressing potential power relations in the research setting, the researcher mitigated some of the concerns by not inviting any direct reports at the Corporate office to participate in the research, and by conducting the research in three Lab hotels that were not under his direct scope of work and where individuals did not know him. This way, he could balance the strengths and potential issues of insider research.

Being an insider-researcher then can also result in a number of advantages, such as the knowledge how an organisation really is, and what can potentially be further uncovered to the benefit of answering the research questions. According to Brannick and Coghlan (2007: 72), '*... insider research is not problematic in itself and is respectable research in whatever paradigm it is undertaken*'. The limitations of insider-research can also be minimized by ensuring a high quality of research, and by respecting a number of ethical considerations, as outlined in the last section.

Chapter 4: Results and Discussion

Introduction

Although more detailed conclusions within the context of the literature review and the research questions are considered in the Conclusion chapter, the Results and Discussion chapter already looks at a number of broad results implications. This chapter is structured in line with the two-phase case study design outlined in the previous chapter, starting with the results of the survey and document analysis in phase 1, followed by the analysis of the individual interviews and focus groups in phase 2. Phase 1 therefore will follow a more quantitative-dominated analysis of results supported by tables and numbers for the survey, whereas Phase 2 will be more qualitative in nature, structured around the themes elicited from the interviews and focus groups, supported by actual quotes from participants.

Design-thinking

The design-thinking process was the vehicle through which learning organisation reforms were introduced into the case study organisation, with the stated objective to foster innovation to differentiate the organisation from its competitors. As described in the Methodology chapter previously, this process was used as a proxy for organisational learning to prompt interview participants to talk about leadership behaviours during the roll-out phase of the process. Design-thinking, as applied by the case study organisation, is rooted in the effort to foster innovation ‘by design’ (e.g. Gaynor 2002, Brown 2008, 2009), and portrays innovation as a process to identify the unique needs of customers or employees, and create equally unique solutions for them.

The case study organisation worked with the Stanford University’s ‘*d.school*’ (School of Design), to adapt their design-thinking process to the organisational environment. As outlined in Figure 3, the process consists of five steps, which can be recombined in several ways in order to properly define a problem, uncover specific needs and develop innovative solutions accordingly.

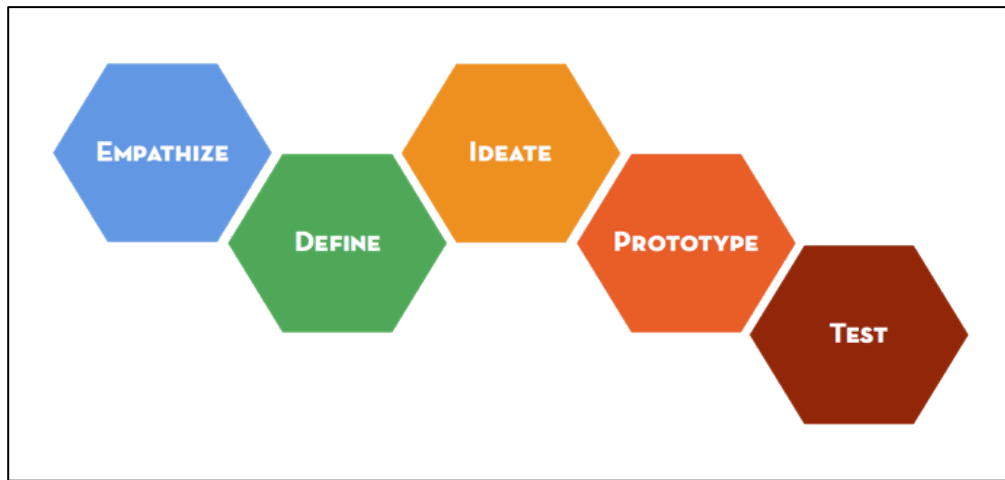


Figure 3 - Design-thinking elements

At the time when this study took place, the case study organisation had rolled out the design-thinking process in all their eight Lab hotels, and had run a number of two-day workshops for all middle managers and senior leaders in each property. In addition, a number of corporate leaders had participated in those workshops as well, and were given the same opportunity to practice design-thinking to solve both guest and employee problems. The workshops were facilitated jointly by a consultant from the *d.school* and the case study organisation's own Innovation team. The strategy to roll-out the process in a limited number of hotels for a year was chosen to test its applicability and effectiveness before considering rolling it out to more hotels⁸. Appendix 11 shows the kind of innovation projects the Lab hotels were undertaking at the time this study took place, using the design-thinking process.

Under the design-thinking initiative as adapted by the case study organisation, the steps can be summarised as follows:

Empathy in general means that one can feel what another person is feeling. From what the case study organisation's Lab hotels had learned over the first year, it was suggested that empathy was one of the key elements or skills of the process. They felt that it was

⁸ In the year following this study, the case study organisation rolled out the same process across the organisation, running over 30 'train-the-trainer' workshops in various parts of the world, letting the hotels cascade the process down to their respective middle managers and senior hotel leaders to practice design-thinking.

the foundation of a human-centred design process where deeply understanding people lead to designing better and innovative solutions for employees and guests. Empathising in the design-thinking process was defined by the case study organisation as experiencing what customers, employees or other stakeholders would experience, observe their behaviours in the context of their lives, engage and interview them both formally and informally to gain a better insight into their needs and perspectives.

The goal of the next step of the design-thinking process, *Define*, is to reframe a problem or focus area in a new and unique way grounded in the insights gained from the empathy interviews. This new point of view potentially exposes new opportunities by looking at topics and themes differently, focuses and guides innovation efforts and combines empathy with creativity.

Ideate is the part where participants in the design-thinking process start brainstorming, gathering as many ideas as possible, building on each other's ideas, encourage 'out of the box' thinking and avoid judgement. Once all ideas are up, they can be evaluated and a focus area or topic selected. The result of the ideating session, as outlined by the case study organisation's design-thinking process, should be that participants have a selection of ideas that are either breakthrough, implementable or non-implementable, delightful for the customer, or obvious and easy to implement. This part of the process assists in identifying priorities, before starting the next steps of prototyping and testing.

Prototype is a step used to potentially reduce risk, and avoid that too much work is going into a solution, which then makes it too late to stop if it fails. The design process teaches to start prototyping, try out ideas, starting from scratch again if necessary, and only then proceeding to the next level of planning and testing. As prototyping is very cost-effective, a number of ideas can be tried out before the best one is selected and further developed for testing.

The next step in the design-thinking process is to *Test* potential solutions. In the testing phase, participants are testing whether the solution they were proposing addresses the right needs. End users should be given the opportunity to test the prototype, so their experience can be observed. Empathy will again come into play, making sure that participants continue to listen to what the users have to say, and use this insight to translate results and feedback into learning. The testing phase of the process seems to

give the participants a unique opportunity to use the learning from it to improve the solution, or if the testing really failed to go back and start with the process again.

As can be seen, in stating its intention to develop and leverage the capacities of its employees in order to innovate and find new ways of competing, the case study organisation indicates its implicit desire to move closer to a learning organisation model. The following sections of this chapter will firstly assess the extent to which its efforts have matched this rhetoric, and then describe the role of leadership in bringing this process to life in more detail.

Results of Phase 1

The Dimensions of the Learning Organisation Questionnaire

The overall findings as shown in Figure 4 below, based on the mean scores in each dimension measured against the normative database provided by Marsick, signifies that the case study organisation scored above the norm (i.e. the average score achieved by other reporting organisations) in each of the seven dimensions of the learning organisation, as well as in the two organisational performance variables. The results therefore indicate a relatively positive perception of members⁹ of the case study organisation relative to the adoption of the dimensions of the learning organisation and the performance outcomes as a result of it.

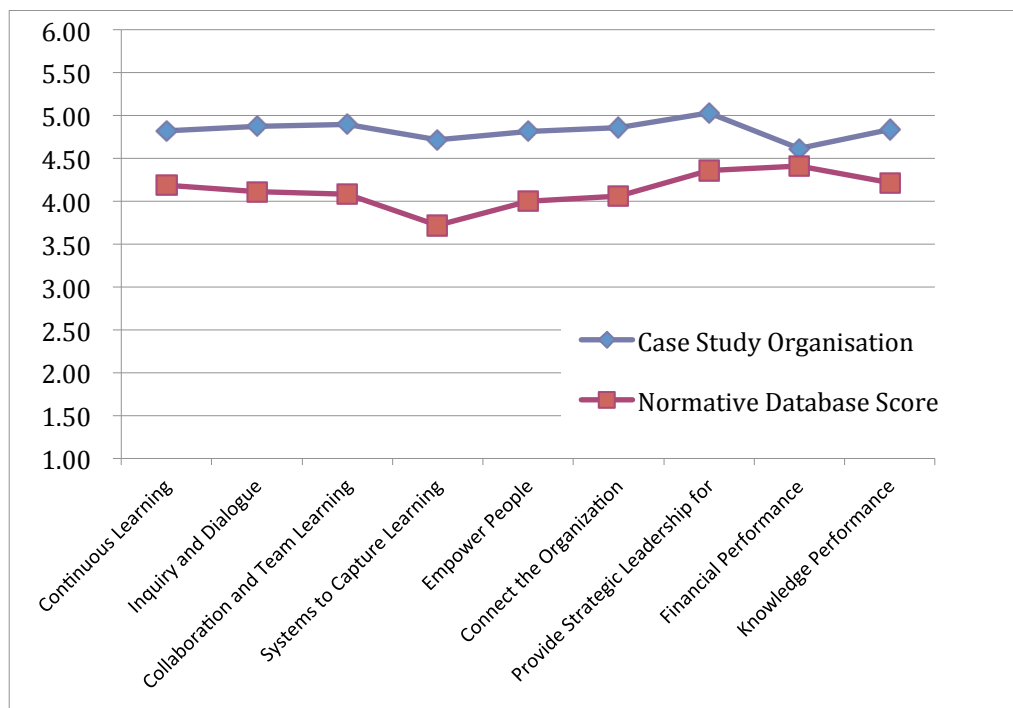


Figure 4 - Survey Result Graph

Table 15 below shows the scores of the normative database compared with the case study organisation's mean scores in each of the seven dimensions, along with their

⁹ As a reminder, and as outlined in the Methodology chapter, the survey participants were mainly middle managers and senior leaders in the selected Lab hotels, as well as senior leaders at the case study organisation's Corporate office.

standard deviations. Additional information includes data around the median for each data set and group measured on the same scale of 1 to 6: the mean scores for the normative database ranged from 3.72 for ‘Systems to capture learning’ to 4.41 for ‘Financial performance’, with a median score of 4.11; in comparison the mean scores for the case study organisation ranged from 4.62 for ‘Financial performance’ to 5.03 for ‘Provide strategic leadership for learning’, with a median score of 4.83. The high score under this leadership dimension within the DLOQ again underlines the importance leaders have in an organisation to foster organisational learning, and this is exemplified here as well within the case study organisation where overall score across all groups is very high and the standard deviation is the lowest of all dimensions.

Dimensions of the Learning Organization	Normative Database Score	Overall Scores	Std Dev	Middle Mgrs	Senior Mgrs	VP and higher	Not id'fied
N		72		39	18	13	2
Continuous Learning	4.19	4.82	1.21	4.83	5.39	4.08	4.57
Inquiry and Dialogue	4.11	4.88	1.14	4.99	5.36	3.92	4.58
Collaboration and Team Learning	4.08	4.90	1.14	4.97	5.33	4.14	3.83
Systems to Capture Learning	3.72	4.72	1.28	4.87	5.06	3.78	N/A
Empower People	4.00	4.81	1.16	4.93	5.22	3.92	N/A
Connect the Organization	4.06	4.86	1.13	4.85	5.24	4.38	N/A
Provide Strategic Leadership for Learning	4.36	5.03	1.07	5.11	5.42	4.27	N/A
Financial Performance	4.41	4.62	1.21	4.74	4.71	4.09	N/A
Knowledge Performance	4.22	4.83	1.13	4.92	5.06	4.22	N/A
Min	3.72	4.62		4.74	4.71	3.78	
Med	4.11	4.83		4.92	5.24	4.09	
Max	4.41	5.03		5.11	5.42	4.38	

Table 15 - DLOQ Results

Although personal information on job level and work location was collected during the survey, a more detailed analysis of statistically significant variances between those scores was outside of the scope of this study.

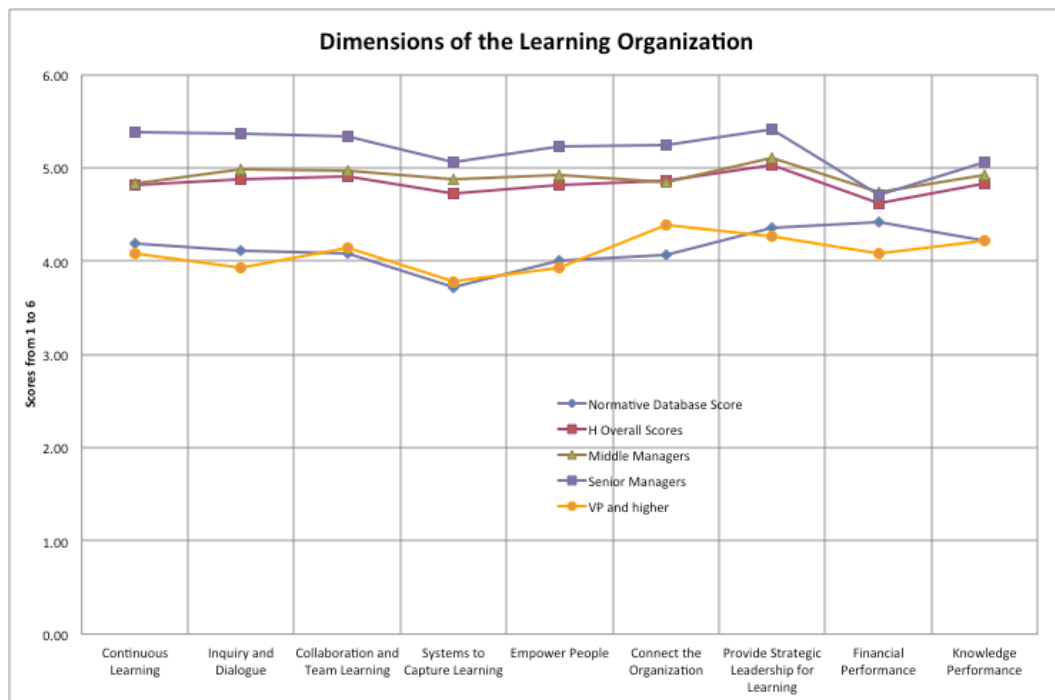


Figure 5 - DLOQ Results Graph by group

It was interesting to see that the responses from the 'VP and higher' level were somewhat different from other respondents. A number of hypotheses could be established to explain these variations, such as for example the fact that this was the group that was mostly impacted by the case study organisation's re-organisation. Testing those hypotheses would be outside the scope of this research, but could present an interesting topic for further research.

Overall, the data from the DLOQ seem to suggest that the organisation is relatively advanced in terms of its attainment of the learning organisation standard based on Marsick's model (Watkins and Marsick 1996). This gives a basis on which to treat it as a site for investigating how leaders operate, what skills they need and use in organisations that have had some success in attaining learning organisation status. What comes next in form of a document analysis is simply intended to add additional weight and detail to this picture.

Document Analysis

Although organisations are major producers of documentary materials, the researcher was also recognising that documents don't often convey facts that can be presented as an objective reality but rather promote a particular point of view or perspective within and outside of the organisation (see Atkinson and Coffey 2011). Documents therefore can tell us something about how the organisation likes to present itself, but taken in isolation they cannot truly tell us how the organisation operates day to day. The purpose of the document analysis in this research was mainly to add weight and detail to the picture emerging from the above survey data, and thus was condensed significantly from what was initially outlined in the Methodology chapter.

The case study organisation's leadership had initiated a change process through a major re-organisation, and the below extract from a memorandum from the Chief Executive Officer sent to all leaders in the organisation outlines well the context of organisational change within which this research took place:

"I am writing to you as we transition to a new organization structure and operating model designed to make the company more flexible and responsive. The new structure is the result of a great deal of work and thought and is designed to allow us to operate as a more cohesive and innovative organization. I am delighted to share additional details about the changes we have made and the new ways we will work together." (Appendix 8)

He went on to outline some of the other changes that were implemented during the re-organisation, such as the consolidation of certain activities that were formerly fragmented or duplicated across the organisation, and pushing authority and accountability from the Corporate office to the field so decisions could be made by the individuals closest to the guest. These structural changes were explicitly aimed at fostering openness and working differently, therefore changing how the organisation worked together.

The available organisational documentation paints a picture of a company attempting to provide ample opportunities for continuous learning, both on the job in form of experiential learning and coaching, as well as off the job in form of more formal education and training. For example, a global 'Learning Philosophy' was recently

developed, outlining the company's strategy around learning, training and development. Although rather philosophical in its format, this document is available in a prevalent place on the organisation's intranet, and outlines the company's approach to learning, employees' role in learning, learning tools and basic details about leadership development. A process based on individual development planning also seems to be in place, designed to allow employees to participate in a structured career and development planning process. The case study organisation also has a more formal tool in place to track learning, in form of a learning management system. This tool aims to assist disseminating training and learning resources across the globe, tracking individual learning, and establishing learning curricula for a number of roles.

From an inquiry and dialogue perspective, the researcher was also looking for evidence of processes that allow employees to give feedback and express their opinions. The case study organisation's yearly engagement survey with subsequent action planning seems to be the strongest process illustrating this dimension. Employees have an opportunity to participate in a third-party survey and give their opinion on how they feel about the organisation and the workplace, as well as to be actively involved in the subsequent action planning process. In addition, the case study organisation rolled-out a new action planning process following this survey, focusing more on the conversation rather than survey results per se. Leaders are taught to use their empathy skills to elicit where the barriers to success are in their teams, in order to develop more meaningful action plans.

The case study organisation also has an articulated mission, goals and values, which are translated into leadership behaviours expected from leaders across the organisation (Appendix 9), and have been integrated in the organisation's performance management process. One document that exhibits those expected behaviours is the case study organisation's 'Performance Model' (Appendix 10). The performance model includes both the core skills and behaviours that are expected by anybody in the organisation, as well as the leadership expectations that outline the specific behaviours expected by leaders. Under other, they explicitly spell out 'living values' and 'promoting learning', which underlines the apparent commitment to learning by the case study organisation.

The case study organisation has also developed a comprehensive framework around corporate responsibility and community involvement, based on four core pillars: education, health & wellness, environmental sustainability and economic development.

This 'Thrive' framework was rolled-out to all hotels and offices around the world, and the yearly Corporate Responsibility Report illustrates the commitment from the case study organisation's Chief Executive Officer, and showcases all the activities and initiatives that have taken place around the world in support of this strategy. Although mainly prepared for public relations purposes, the report also outlines some of the achievements of the 'Thrive' initiative in recent years, such as the number of hours contributed to community activities and number of initiatives launched within the 'Thrive' framework (i.e. in the areas of Education, Health & Wellness, Environmental Sustainability and Economic Development), and how all the various properties around the world contributed to it.

The case study organisation seems to view itself as an innovative organisation, and some of the projects that are currently being tested would arguably support this view. Between the eight Lab hotels, they had well over 120 projects at different stages of testing; some based on real innovative concepts, other addressing process or product improvements (Appendix 21). Knowledge is also shared across geographies with the help of the case study organisation's intranet, which can be accessed by any employee in the organisation. The 'innovation lobby' and 'proven practices' are two tools that have been put in place on the intranet, allowing employees to submit innovative ideas and hotels to share best practices.

Acknowledging the limitations of documentary analysis as outlined at the beginning of this section, the above should help to support and elaborate on the picture presented by the earlier survey data. Although often top-down driven, the outcomes of the document analysis when considered in combination with the findings of the DLOQ, lend some support to the notion that the case study organisation is indeed an organisation on a journey of becoming a learning organisation, and can therefore be considered an appropriate site for researching the skills needed by leaders to create the conditions and structures characteristic of a learning organisation.

Findings of Phase 2

The below findings of phase 2 of the research build onto the findings of both the survey and document analysis of phase 1 above. As outlined in the Methodology chapter, qualitative data was collected through individual interviews and focus groups, using the critical incident technique. Participants were asked to recall situations where leaders made a difference during the rollout of design-thinking at the case study organisation's Lab hotels. Differences referred to both positive and negative outcomes. The individual and focus group interviews generated a large amount of data that was transcribed, analysed and coded accordingly. The initial write-up of this chapter included a lot of rich and detailed information, which was subsequently condensed to focus on data that was essential to answer the initial research questions. The coding summary is available in Appendix 6.

The case study organisation

Barriers and challenges to a learning organisation approach

During the interviews, participants discussed a number of topics representing barriers and challenges the case study organisation may encounter on its journey to becoming a learning organisation. The most prominent ones were the feeling by participants that innovation and organisational learning may become only a corporate (i.e. head office) initiative, that the culture was not ready, that the case study organisation did not have the right leadership, that individuals in the organisation did not want to go through the pain of change, and that the high tenure of many employees may hinder attempts to roll out processes for innovation and learning to a wider audience.

Code Level 2	Code Level 3	Sources	References
Barriers and challenges		10	88
	Budget	2	7
	Communication	3	3
	Corporate initiative	5	7
	Culture	5	10
	Customers	1	1
	Internal interests	2	5
	Involvement	1	2

Leadership	4	13
Learning support	2	5
More work	1	2
No change	6	7
Overload	1	1
Planning	2	2
Results	2	3
Scepticism	1	5
Tenure	4	6

Table 16 - Barriers and challenges

Corporate initiative

This challenge seemed on the mind of many participants, and was also expressed as a major concern by the case study's Chief Executive Officer during a recent town hall meeting¹⁰:

"In fact when [name] said he got a call and that it was about an initiative from corporate, my hair stood up on the back of my neck because I know what that can sound like. Like, 'Here we go again, another initiative from corporate'¹¹. Thanks a lot.' ..." (Chief Executive Officer)

Participants described the tendency that activities in form of 'initiatives' launched by the Corporate office, or by a specific function such as Human Resources, as one of the biggest challenges to creating an environment where innovation and organisational learning can take place. If it is viewed as something that may come and go again, not enough support from all areas of the organisation will be available – as described by one of the Human Resources Directors:

¹⁰ Town hall refers to a communication tool the case study organisation is using on quarterly basis, where the CEO and selected senior leaders of the organization present an update to the rest of the company. This is broadcasted live around the globe through the case study organisation's intranet.

¹¹ In the case study organisation's language, the word 'corporate' mainly refers to something coming from the company's head offices.

“Again, somebody thinking that this is just an HR initiative, hare-brained idea that's not going to last very long.” (Human Resource Director, Lab hotel 1)

Being seen as an initiative only potentially hinders a strategy from becoming a part of an organisation's culture. A similar conversation started during one of the focus groups, where participants brought up a number of other examples of such initiatives that were launched, but quickly got forgotten as well:

Participant 1: “To [name]’s point, we’ve heard that before from [case study organisation] too and other programs have come down the pipe and...”

Facilitator: “That’s what a lot of people are saying these days. This is just the flavour of the day. This is just another initiative and let’s just sit tight and wait until it’s over again and they come back with something new. I’ve worked for [case study organisation] for 20 years as well.”

Participant 2: “Exceptional people exceptional...”

Participant 3: “Exceptional experiences.”¹²

Participant 2: “That lasted a week.”

Participant 3: “We painted it on the walls and phone greeting and then it was like don’t do that anymore.”

(Senior Manager Focus Group, Lab hotel 1)

The consensus from many interview participants therefore was that such initiatives needed buy-in in the field, and had to become anchored in the day-to-day behaviours of leaders in the hotels. The prevailing view was that if words such as ‘innovation’ and ‘learning’ become simple buzz-words, then the organisation's culture would struggle embracing this important shift. Viewing the roll-out of a major long-term change

¹² Within the case study organisation's North America division, ‘Exceptional People, Exceptional Experiences’ was a corporate initiative launched a few years back, which did not last very long.

initiative such as design-thinking as a simple short-term corporate initiative would potentially be in line with the concerns about the learning organisation concept raised by writers such as Keep (2000) and Grieves (2008), who argue that many organisation's focus on short-term profits, as often requested by shareholders, would not be fruitful ground for such concepts and strategies.

Culture

Bishop *et al.* (2006) highlighted the importance and impact of a 'learning-supportive culture', and how culture could potentially support or inhibit learning. Researching the impact of culture on organisational learning is beyond the scope of this paper, but the interviews gave some interesting insights into what potential barriers could exist from a cultural perspective. Although the design-thinking process was well received by the Lab hotels, in some instances the individuals, as well as the work environment, were not entirely ready for it. On one side were the existing work processes that had been in place for many years and that did not support the goals of empathy, experimentation and participation, key elements of the design-thinking process, but on the other side was also the mind-set of individuals that inhibited the momentum of the process:

"Yeah, I was thinking about the idea of kind of what comes first in that innovation process. Was it focus on changing individuals' mind-sets and behaviours so that they then can both be more open to and be more likely to innovate; or do you put in place a five or ten step process and say 'just do this' and six months later you've actually changed their mind-sets. There's no answer to that question from me ..." (Corporate Vice President 2)

The impact of 'culture' was also discussed in the Literature Review earlier, with a number of writers arguing that many organisations' culture may put additional barriers to organisational learning in place (e.g. Eraut *et al.* 1997, Slater and Narver 1995). Within the case study organisation, there was widespread consensus among respondents

that the organisation had a great¹³ culture that made them successful in the past, but that moving forward this culture had to evolve in order to become a catalyst for change. The quote below from another Corporate Vice President mirrored many other comments from interview participants, underlining this tension of trying to implement a new philosophy without aligning the culture to support it:

“But, the big challenge is that our company is a company that is very top-down driven. [...]. I think there is a clash between that one culture and the other culture where the leadership of the top-down approach is not comfortable with the bottom-up approach, and the two they are not complementing each other...”
(Corporate Vice President 4)

The tension within the case study organisation therefore was that some leaders wanted to scale the design-thinking process as a vehicle for innovation and learning faster and more widely, while there was another group of leaders who believed that the organisation’s culture had to evolve first before real change could happen. Nevertheless, there was consensus from most participating leaders that the organisation’s culture had to evolve in order to scale the design-thinking process, and subsequently start looking at the obstacles that were currently in place. This approach would support Garvin (1993), who raises a number of critical issues that needed to be addressed before an organisation could even embark on the journey to become a learning organisation, such as the establishment of its own with its own pragmatic and meaningful definition of a learning organisation, with corresponding guidelines to managers and leaders across the organisation, and tools for measuring success.

Although *Change* was coded separately, it also relates closely to the issues of *Culture*. The pain of having to go through change was another theme that came out of the interviews, with a number of participants arguing that many individuals would be much more comfortable holding on to the status quo. The following quote comes from a

¹³ Many interview participants described the case study organisation’s culture as ‘great’, without qualifying the exact meaning of it other than that it was recognised both internally and externally as such. Based on the demographics of the interviewees, it also represents a rather managerial rather than organisation-wide view of culture.

senior manager in a Lab hotel, during a conversation how the philosophy of a Lab hotel could be scaled to other hotels as well, and the difficulties associated with this change:

“The staff changes a lot more often. How they’re going to do three menu changes a year through the seasons? [...] How are they going to do all that kind of stuff, because it’s really difficult here and we have seasoned staff and seasoned sous chefs and seasoned executive chef that have been around for a long time? I can’t imagine doing it at that level. It would be like fire alarms going off for weeks.” (Senior Manager Focus Group participant, Lab hotel 1)

This example also exemplifies the potential difficulty in bringing the learning organisation concept to the hotel industry, which is still characterized to a certain degree by fairly rigid hierarchies that will challenge any change process (e.g. Teare and Bowen 1997, Teare and O’Hern 2000). Also, because the case study organisation had been successful in the past, and because so many things had been done the same way for so many years, change was not at the forefront of many individuals’ minds. The organisation’s Chief Innovation Officer expressed this tension during a recent town hall meeting, underlining the effort it takes to change:

“So part of what’s going to happen is we’re going to go bigger, bolder, faster in the existing labs and I appreciate [General Manager of a Lab hotel]’s candour because [Chief Executive Officer] talks a lot about the impact of muscle memory. If we’ve been doing something for years and years and years it’s hard to change that and I think for all of us that have been a part of this and for those of you that are about to, just remember that.” (Chief Innovation Officer)

The ‘muscle memory’ that would be needed is the memory about embracing and managing change. Inertia, or a lack of willingness to change, to accept change and to manage change, therefore can be considered another barrier to rolling out the design-thinking process and foster learning.

Another subset of *Culture*, and also related to *Change*, is the theme of *Tenure*; individuals who have spent the most time within the culture are those who are less inclined to change it. This theme emerged on a number of occasions during conversations with participants, with the case study organisation being characterised by high tenure, especially in management and senior leadership. The case study

organisation's latest Corporate Social Responsibility Report published recent tenure information, indicating that in 2012, 14'000 out of 90'000 associates globally had 10 or more years of service with the case study organisation, and 6'000 out of these 14'000 had 20 or more years of service. The tenure of General Managers in the case study organisation was averaging 20 years of service (Appendix 12). In a customer-service company such as the case study organisation, retention is usually one of the key talent strategies, but as with culture and leadership it can be a double-edged sword.

Although 'tenure' did not emerge explicitly from any writings covered in the Literature Review, Appelbaum and Gallagher (2000) argued that overall, different organisations will have to take different approaches to becoming learning organisations, as organisational learning is heavily influenced by critical variables such as culture, values and other environmental factors in the context where those organisations operate, which may well include factors such as 'tenure in the organisation' as well. High tenure can potentially make it very hard to manage change, as expressed by a participant in one of the focus groups, during a conversation regarding how some of the current General Managers would potentially have difficulties operating a Lab hotel for example:

"I don't think that he'd embrace it well. I don't know. He's a pretty cool guy but I know he's grown up within [case study organisation] so I think it would be challenging for some people to change when it comes to that type of stuff."
(Middle Manager Focus Group participant, Lab hotel 1)

The following quote came from one of the senior managers in a Lab hotel during a focus group, who recently participated in an Engineering Directors Meeting where the design-thinking process was presented:

"Old engineers! Quite honestly it was across the board. Just about everybody was like 'I don't understand what we're doing here'. By the time day two rolled around, I think people had started to buy into the process of understanding what we're doing. [...] I had the same feelings when I first did it in [Lab hotel 3 name] like 'what are we doing here'. I think it can be taught. I think it's a very different concept for us, but I think it's teachable." (Senior Manager Focus Group participant, Lab hotel 1)

This quote outlines that although high tenure can potentially present a barrier to learning and innovation, it doesn't always have to be one.

Leadership

As outlined by Gephart *et al.* (1996), the discussion around culture is closely related to the topic of leadership, an area that the leaders in the above-mentioned design-thinking workshops considered as one of the most important levers to promote a shift in the organisation's culture. There was a common view among many interview participants that there often was lack of trust and support by superiors due to their desire to maintain control.

“It's outside their comfort zone. When you have done things all throughout your professional life or even personal life that have given you dividends or what you perceive as things being successful.” (Corporate Vice President 3)

This potential barrier also mirrors the concerns of Hughes (2000) that the learning organisation concept assumes senior leaders to have an endless faith in the value of empowerment and continuous development, which is not always the case. A more detailed section around leadership will follow later in this chapter, and participants by no means suggested that all leaders were characterised as above, but there was consensus that leadership behaviours needed to be reviewed in order to create the kind of culture or environment that would allow participation, experimentation and learning. Like culture, leadership therefore can be seen driver of, but also as a barrier to organisational learning and innovation, if it does not support the creation of the right culture for learning.

The other side of the coin, and looking at the previous points made about barriers to organisational learning, seems to be that the inertia potentially caused by lengthy tenure can possibly be managed and even reversed through appropriate intervention and management development. This argument led to another interesting perspective: what were reported as the most successful tactics or strategies to overcome some of those challenges and barriers?

Organisations overcoming barriers

The literature doesn't explicitly address how to overcome barriers, but a number of studies are available describing in practical terms how an organisation might move towards becoming a learning organisation (e.g. Chinowsky *et al.* 2007, Garvin 1993). Other than 'leadership' itself, which is discussed in the following section, a number of other tactics and strategies to overcome barriers to organisational learning in the case study organisation emerged during the various conversations. What respondents mentioned most frequently was that reviewing the selection process for new employees would be the most successful tactic in addressing some, but not all, of the issues covered in the previous section.

Code Level 2	Code Level 3	Sources	References
Organisations overcoming barriers		10	33
	Communication	1	2
	Culture	3	3
	Incentives	2	3
	On-boarding	1	1
	Selection process	7	13
	Wider involvement	1	2

Table 17 - Overcoming barriers

In one of the Lab hotels, the General Manager explicitly tasked her Human Resource Director to look into the way candidates were interviewed and selected, in order to come up with a better way of identifying the kind of leaders and employees in general that would be successful in a Lab hotel. During the interview, the Human Resource Director summarised the need for this new approach as follows:

“You know, it started with that simple thing which gave me the freedom to say all right we’re going to look at our selection process because if my employees now have to be able to learn and adapt faster, try new things, be more open to change, understand that their job will change in two years, five years and then it’s going to change again and then it’s going to change again and then it’s going to change again.” (Human Resource Director, Lab hotel 3)

The process change revolved not only around looking for a different profile to hire, but also at the way interview questions would be asked. If the hotel was looking for individuals who were not afraid of failure and experimenting and of questioning the status quo, then interview questions had to be changed as well. One of the new questions the Human Resource Director asked applicants was around *'tell me about the last time you failed'*. According to him, this additional question alone gave him a great insight into a candidate's ability and willingness to experiment and learn.

In an interview with one of the Corporate Vice Presidents, the discussion led to the differences between selecting entry-level managers versus more senior leaders. The question that came up was whether a leader should possess all the important leadership skills that the organisation is looking for, or whether they could be taught later.

"So I think you can refine some of what they've learned if you bring in a senior executive. [...] I think you could be able to say, we can teach them some of those skills and refine some of what they already have. Whereas with younger ones it's gonna be far more big. I think, a greater runway and a blank slate to work with. So I think you're right. I think that where we can really go extremely far with selection and development is to say we're not as concerned bringing in a mid-level manager or below that hasn't had these experiences because a) we can provide them and b) we can teach them." (Corporate Vice President 2)

The above quote also raises an interesting point, presenting an opinion that leaders are made, not born - especially when looking at recruiting and developing entry-level or middle management. Reviewing the selection process in the case study organisation therefore was viewed by respondents as a key tactic, both for the hire of the general employee population as well as for leaders. The more senior the leaders to be hired are in the hierarchy, the more the selection process has to be able to elicit the behaviours that support this culture shift towards learning and innovation. The implementation of the design-thinking process, and the general approach of allowing employees across a hotel to participate, experiment, fail and learn, seemed to have provoked this shift in looking at a different candidate profile on all levels.

The perceived value of the learning organisation concept

Not many quotes were coded in this category, but on a number of occasions the discussions revolved around different expectations of what the outcomes of all those design-thinking initiatives should be. Is the case study organisation looking at putting structures and process in place to drive breakthrough innovation? Or implement an environment of continuous learning and improvement? Overall, there was no evidence that any of the interview or focus group participants did not believe in the value of creating an environment where individuals can try out new things; on the contrary, the establishment of the Lab hotels and the rollout of the design-thinking process generally seemed to generate excitement and passion. But the quote below from one of the Corporate Vice Presidents reflects a certain level of confusion about the final outcome of the entire initiative, and it seems that learning and innovation has to be defined specifically within the scope or mission of an organisation:

“At the end of the day, we’re not Google, we’re not Yahoo so yes, we can have creative people but they also have to conform to a certain degree, I guess.”
(Corporate Vice President 4)

This is an interesting and important point that hints at some ambiguity in the meaning and definition of the learning organisation concept, as outlined by writers such as Garvin (1993), Grievies (2008) and Eijkman (2011) in the Literature Review. As a model, the learning organisation encourages empowerment and individual experimentation. However, this may come into tension with organisational desires or requirements for at least some level of uniformity, standardisation and predictability. Such standardisation is often required in the hotel industry in which the case study organisation is operating, in order to offer a consistent experience to customers across geographies and brands.

Parallel to discussing the value of the learning organisation concept, or the potential benefits of moving towards becoming one, two questions were added to the original ‘Dimensions of the Learning Organization Questionnaire’ to measure the actual perception of value by participants.

95% of all respondents felt that the questions asked in the survey, based on the concept of Watkins and Marsick’s (1996) framework of the learning organisation, were relevant

or even very relevant to organisations in the hospitality industry, and an even larger percentage felt that the concept could be particularly valuable to the case study organisation itself (see Table 18). This also mirrors the argument of Brownell (2008), that despite all the potential barriers and issues raised by a number of writers, such as high employee turnover and often strict hierarchical structures (e.g. Gjelsvik 2002, Teare and Bowen 1997), the creation of learning organisations can assist the hotel industry, as well as the wider hospitality industry, in being more successful at implementing strategic plans.

Questions	Not relevant						Average	Answers
	1	2	3	4	5	6		
Having completed the above 'Dimensions of the Learning Organization Questionnaire', how relevant or valuable do you feel are those questions to the hospitality industry in general?	1	0	3	17	28	21	4.91	70
	1%	0%	4%	24%	40%	30%	100%	
How relevant or valuable are they to [case study organization]?	0	0	3	13	26	27	5.12	69
	0%	0%	4%	19%	38%	39%	100%	

Table 18 - Relevancy of learning organisation concept

The impact of leaders

Leadership skills conducive to the creation of a learning organisation

The importance of leadership in creating the conditions and structures characteristic of a learning organisation, and in overcoming potential barriers to organisational learning, has been addressed extensively in the literature (e.g. Nyhan *et al.* 2004, Popper and Lipshitz 2000, Marquardt 2000, Antonacopoulou 1999, Tannenbaum 1997, Senge 1990, Watkins and Marsick 1996, McGill *et al.* 1992), and was also identified in the findings of the survey results discussed in the previous section of this chapter. This study aims at identifying the specific leadership skills that are conducive to the creation of those conditions and structures, in particular within the hotel industry, and whether they are influenced by the wider organisational context.

During the interviews, participants were asked to recall situations where leaders were either very successful or not successful during the design-thinking process rollout in the Lab hotels. After coding of the interview transcripts, as described in the methodology chapter, over 30 leadership skills could be elicited and 10 of them were considered more critical to focus on (see Table 19 below). The criteria to select those 10 leadership skills were the number of sources and references mentioning the respective skill (elicited from at least 6 different sources with multiple references).

Code Level 2	Code Level 3	Sources	References
Leadership Skills		15	278
	Adaptability	6	10
	Broad perspectives	1	1
	Change management	6	11
	Coaching	4	12
	Collaboration	4	9
	Communication	5	7
	Customer focused	1	1
	Emotional intelligence	1	2
	Empathy	11	33
	Empowerment	7	13
	Experimentation	8	17
	Failure	7	20

Humility	3	8
Influencing	3	6
Innovative	1	1
Learning agility	9	22
Listening	7	16
Loyalty	1	1
Multi-tasking	1	3
Openness	7	11
Organisation savvy	1	2
Participation and involvement	6	8
Passion	4	5
Pragmatism	1	1
Problem Solving	1	1
Process	4	5
Respect	1	1
Role Model	4	6
Strategic	1	1
Technology savvy	3	3
Transparency	1	1
Trust	5	10
Visionary	1	1

Table 19 - Leadership skills

Adaptability

Rolling out design-thinking and establishing Lab hotels were two very new approaches for many leaders in the case study organisation. One of the Corporate Vice Presidents' described the example of two high-tenure General Managers, who were seen as being very successful in embracing these new approaches, and adapting their leadership accordingly.

“To me he’s the hero of the Lab hotels... The other one is the GM in [country], I think [name of a General Manager] stepped up big time because he’s an old finance guy that thinks things are either black or white in this world and he opened his mind drastically.” (Corporate Vice President 3)

Another Corporate Vice President also underlined the importance of both organisations and individuals being able to adapt to the new world, and to new ideas:

"It's not the biggest, strongest, or the most beautiful bird that survives; it's the one that can adapt. I find the word 'innovation' is the wrong term because it creates a certain expectation. It makes everybody think that we're gonna come up with an Apple iPhone or something like that, which we're not. I don't think we will, but we need to evolve. The one thing is everything is customer-based. In order to evolve you truly need to be employee centric because in the end they make it happen on a day to day basis." (Corporate Vice President 4)

The above quote also makes again an interesting point about the applicability of the learning organisation concept in the hotel industry, as outlined in the previous section already. If organisational learning is not used for breakthrough innovation, it seems that the concept might be applied or manifested differently in different industries.

Another example about adaptability was described by one of the Human Resources Directors, about an individual who had never been involved in a Lab hotel or in design-thinking before, but had subsequently become one of the hotel's key players in driving the process and implement a number of new, sometimes innovative approaches.

"One of the projects here was about 'women's preference' - you know for our women travellers that come to our hotels. He was able to involve housekeepers, coordinators, other managers, and engineering in different teams to be able to achieve the results. I think his engagement scores went up. He has done a fantastic job. He's not only a talented manager in his own right but he has been able to make the change, make the adjustment to the new style that is required for this kind of initiative to work." (Human Resources Director, Lab hotel 3)

The above quote gives also very useful information about how specifically the process of implementing adaptation might work. Respondents felt that the ability of leaders to adapt was critical, especially in times of accelerated change due to the more globalised competition and rapid technological advances. This was also well outlined by several writers referenced in the literature review, such as McGill *et al.* (1992), describing a number of leadership mind-sets, such as the need for managers to adapt to 'permanent

white water' (McGill *et al.* 1992:12), an analogy used to represent the fast paced change organisations are facing today.

Change management

Another leadership quality identified by the respondents was that leaders should have the skills to actively manage change around them. The Lab hotels that were implementing the design-thinking process were also reviewing their selection criteria for new leaders, as mentioned in one of the previous sections. In view of the new approach, the ability to manage and embrace change became one of the key skills they claimed to be looking for.

The interview participants also identified that managing change includes managing a certain amount of ambiguity and uncertainty. As the individuals in the Lab hotels experiment with new things, prototype and test new approaches, and try to operate in a less structured and restricted environment, it was thought that this skill become more and more important for leaders. One example that was brought up during one of the interviews was the 'check-in' experience, where a new approach was tested to take away a number of the more prescriptive steps in the process, and leaving it up to the respective front desk agent to manage this experience. The ability to lead a team through this phase of ambiguity was seen as a crucial skill by the respective manager.

The consensus emerged that the ability to embrace and manage change should become an integral part of a leader's role. The Corporate Vice President quoted below offered strong support for the view that all leaders in the case study organisation should be able to manage and embrace change, and that stricter performance management should be applied to those individuals who do not.

"... if we're really going to be a culture that drives change, then what are we going to do, which by the way, at least for North America, have we ever come and said, 'You know what? You don't embrace change in your job, and therefore this is probably not going to be the place to work for you.' I think we have never had or addressed some of those issues. And so you have the legacy environment that we have as an organisation. And if we are we going to get serious about innovation and change being important, and if you don't do it, this

probably isn't a good place for you to work. I think that's the question to ask."
(Corporate Vice President 1)

The above quote also seems to outline a harder interpretation of the learning organisation model, presenting an argument that only certain people are suitable to work in a learning organisation. This is contrast with the literature of the learning organisation, which represents the concept from a softer and more developmental perspective where people are given the chance to be innovative and adaptable, and can be encouraged and developed into being that way. It usually doesn't address this hard edge as presented above, where an organisation would eject people that they feel are not suited to working in this environment. Although how an organisation deals with performance management is outside the scope of this study, the above quote raises an interesting debate on how to avoid that individuals, having trouble adapting to the new (softer) ways of thinking associated with the learning organisation, fall back on more traditional, tried-and-trusted (harder) leadership approaches.

Although considered as important by the participants of the case study, tolerating ambiguity and uncertainty were seldom referenced in the literature review, and were only explicitly addressed by McGill *et al.* (1992) in form of a leadership mind-set, as outlined in the literature review earlier.

Empathy

This quality was probably one of the more interesting findings. Many respondents felt that, while empathy is often seen as an innate characteristic, it can be learned and tools to foster a more empathetic approach can be developed. This was one of the big learning experiences the Lab hotel leaders went through, when the design-thinking process was launched. The example below is taken from a conversation during one of the focus group meetings at Lab hotel 1, and describes what happened during their 'Borrow-Bar' and 'I-Forgot-Bar'¹⁴ project:

¹⁴ These were concepts/ideas that came out of a number of design-thinking sessions, related to customer satisfaction projects.

“I think it was a good thing for us because we learned the importance of getting customer feedback. I guarantee all of us in our careers have been told our whole life just go out there and make it happen. Just figure it out. So we go out there and we do the best we can. We make the decisions based on what we think is right and we don’t talk to anybody else. I think it was very eye-opening to us that even though we’ve been in the business for 20 years or 25 or whatever it is, we don’t know all the answers. It’s important to listen to what the customer says and feels and thinks.” (Senior Manager Focus Group participant, Lab hotel 1)

This quote from a senior manager at one of the Lab hotels sums up well how empathy was perceived within the design-thinking process: accepting that one does not know everything, listening to other stakeholders to explore their needs, and use this learning in coming up with better and more innovative approaches. The following quote from a conversation during the Senior Manager Focus Group at one of the Lab hotels gives another example:

Participant 1: “The higher performance menus, they were a failure.”

Participant 2: “They were a failure.”

Participant 1: “We tried to give our guests something that they didn’t want and they failed.”

Participant 2: “Because it was the right...”

Participant 1: “Because we didn’t do interviews. We didn’t ask again what they wanted.”

(Senior Manager Focus Group, Lab hotel 1)

While some participants’ perception was that empathy was strongly rooted in personal psyche, others felt that being empathic could be developed by actively listening to and involving others. For some individuals this comes more naturally, for others it seems to be a learned process – as one of the senior managers in the focus group explained:

“So it wasn’t ‘til after we went and learned this whole process off applying empathy to figure out that that’s not really what they were looking for. They

weren't looking for to lot [...] So we started having these empathy interviews with customers and trying to figure out what would work better. That's when we started to learn that really all they wanted was some sort of unobtrusive way to get what they wanted.” (Senior Manager Focus Group participant, Lab hotel 1)

Empathy therefore became a technique used by many of the leaders in the Lab hotels, enabling them to gain the necessary insight about customers' or employees' true needs and to solve for the right problems. Empathy could thus be seen as either leadership skills that can be applied in different situations and contexts, or even more as leadership mind-sets that can possibly be taught.

McGill *et al.* (1992) for example explicitly mentioned 'empathy' as one of the organisational features or qualities that is critical for learning organisations, where leaders have to unlearn previous mind-sets in order for generative learning to occur. Other writers also mentioned the importance of empathy to a certain degree, describing it more as listening and learning from other stakeholders (e.g. Slater and Narver 1995, Antonacopoulou 1995), but overall it does not seem to be described widely as an important leadership attribute in the learning organisation literature.

Empowerment

Empowerment was cited in many studies in the Literature Review chapter (e.g. Watkins and Marsick 1993, Ellinger *et al.* 1999, Goh and Richards 1997, Phillips *et al.* 1996), and it was therefore no surprise that 'giving up control' and 'empower others' were identified as another critical leadership skill. The quote below came from a Lab hotel General Manager, when asked what her role as a leader was in the Lab hotel environment.

“... my role in the Lab now and with the Lab leaders is really I'm not overseeing a project. I have all the Lab leaders and so I'm like the bee going around and pollinating all of the flowers, right? So I'm there to – you know I show up and, 'Tell me what you're doing. What are your road blocks?' So then I facilitate, 'So tell me more about that? What else? How might we?' So it's more of being there to inspire and just keep it unstuck when things get stuck.” (General Manager, Lab hotel 3)

She saw her role as empowering others, and removing barriers for them to learn and grow. And this way of leading was outlined by many participants in a number of critical incidents, as they explained their views on empowering others and getting out of their way:

“And they came up with a lot of feedback. And I think that was a great success first because it achieved results quickly. They didn’t have to wait till the manager got back to them. They had the permission to go fix it. And the result has been higher engagement. People were really very, very excited about the process.” (Human Resource Director, Lab hotel 3)

Empowering people seemed to have contributed significantly in creating this environment where employees can start questioning the status quo and experimenting with new ideas.¹⁵

Experimentation

Linking to the above, the development of Lab hotels started with the philosophy of ‘experimentation’ where employees have the opportunity to test new approaches to solve problems. During one of the interviews with a Corporate Vice President, he was asked about the most striking impact he had seen with the creation of those Lab hotels and the initial rollout of design-thinking:

“The blanket willingness from the people that have been involved to just experiment [...]. But I am far more surprised than I thought I would be initially in both the Lab hotels as well as the corporate function which right now is [name of loyalty program], it's used as a lab but the individuals involved in that are almost wildly willing to experiment and challenge the conventional and challenge the status quo and challenge how things are done.” (Corporate Vice President 2)

A number of illuminating examples were given by participants around how leaders created this environment where everybody was encouraged to try out new things and

¹⁵ It is worth acknowledging here that, given the data available, it is not possible to verify these leaders’ claims about the extent to which they really have empowered their staff.

experiment. One such example was a project focusing on the re-design of a new front desk with the aim of making the check-in experience more efficient and pleasant. A small project team was sent out to look at ideas that were successful at other Lab hotels, talking to both guests and employees working at the front desk, and subsequently starting to mock up different types of front desk designs. These prototypes were designed very rapidly and crudely. They did not hire any designers and expert carpenters, but simply designed a rudimentary product for prototyping. They tried out several designs, invited guests and employees to interact around those prototypes, and collected additional feedback in order to come up with a more sophisticated design. Experimenting with different designs and testing their ideas with guests and employees was the real essence of this environment that leaders in this Lab hotel started to create. The case study organisation's Chief Executive Officer picked up on this great story, and made reference to it during an interview in one of the recent communication meetings:

“If you make it crude and say, ‘You know, we’re just experimenting with this’, and you can tell this is just a mock-up then people say: ‘Okay, well, I guess they’re really looking for my feedback.’ And then they actually bring great feedback. Now you have to listen again two to one ratio. You have to listen very intensively and they came up with a completely unique design, it’s really cool actually.” (Chief Executive Officer)

The Literature Review earlier outlined already the importance of learning from experimentation and exploration (e.g. Slater and Narver 1995), allowing for creativity, innovation and experimentation (Gephart *et al.* 1996) and fostering experimental mind-sets (Nevis *et al.* 1995). But in the case study organisation, experimentation was not only seen as being about leaders creating an environment where employees can try out new things and test their success, it was also about accepting that not every experiment will be successful. The importance of embracing failure was identified as another key skill as outlined in the following paragraph, or as one of those specific mind-sets a leader should adopt.

Experimentation and failure

Learning organisation models tend to promote the view that accepting or even embracing failure creates the motivation for individuals to try out new things (e.g. Antonacopoulou 1999, Nevis *et al.* 1995, Tannenbaum 1997, Popper and Lipshitz

2000). During one of the interviews, a Lab hotel General Manager was emphasizing the essence of design-thinking:

“What holds them back is fear of failure. The whole design-thinking process is all about failure.” (General Manager, Lab hotel 2)

Within the new Lab hotel and design-thinking world, respondents described an environment that goes beyond accepting failure, but towards encouraging failing early and often. One of the managers at a Lab hotel described his experience during a new customer service project:

“I don’t think the whole point of the innovation process was to be really, really good at it; it was just to try it. I think we were really, really good in one field, but the ‘failing’ has been some of the best experiences that we’ve had, especially with the ‘I Forgot Bar’ that we lost.” (Middle Manager Focus Group participant, Lab hotel 1)

The critical incident discussed during the above focus group interview was a project where a team had come up with a new concept to offer guests a facility at the hotel where they could borrow items they may have forgotten at home, such as adaptors, hair dryers, shavers and more (the ‘Borrow-Bar’ or ‘I-Forgot-Bar’ as referenced earlier). The initial prototype failed early with many customers not returning the borrowed items, and subsequent tests did not always bring success either, until the project team moved away from providing a separate facility and came up with a different way of offering customers the ability to borrow those items¹⁶. But the positive end product was the result of experimentation and failure.

In one of the Lab hotels, the Human Resource Director took this a step further, and integrated this mind-set about ‘failing early and often’ in his interviews with candidates from all levels (as outlined earlier when discussing the change of the selection process):

¹⁶ This process actually evolved into the development of an ‘App’ for use by guests on their mobile devices.

“I’m looking for someone that has failed before. If you have, this is one of my questions. If you don’t, if you tell me you’ve never failed, first of all you’re lying. Or, you just don’t take feedback and you blame others. So I like to hire people that have given it their all in something and have failed miserably. Then we have a discussion about why did you fail. What did you learn? What have you done differently? How did that help you to succeed? So we have this conversation during interviews because I need somebody that understands that the innovation process and the learning process will include failure.” (Human Resource Director, Lab hotel 3)

While the philosophy to experiment and encourage failure sounds interesting, the interview data also lead to one more element or skill that seems critical to make it all work: to actually learn from success and failure.

Learning agility

Leaders championing (e.g. Marquardt 2000) and role modelling learning (e.g. Gephardt *et al.* 1996) has already been one of the key leadership roles identified earlier in the Literature Review. Learning agility can be defined in this context as both the ability and willingness to learn. Having seen in the above extracts the perceived importance of not being afraid of failure, it is important to connect this with learning – learning from both success and failure.

“Again we learned from our failure there but I think that’s part of it. I think that’s exactly what we’re talking about. If you don’t learn from it...” (Human Resource Director, Lab hotel 3)

Learning agility also links to empathy, as discussed earlier, valuing leaders that can accept that they don’t know everything and that are not afraid to ask and learn:

“But on the other hand she also allows you to teach her. There are things that she doesn’t know and she’s very open about it. She’s not one of these managers that think ‘oh I need to know it all’. She’ll actually come in and say ‘that’s intriguing - tell me more’.” (Human Resources Director, Lab hotel 3)

The importance of learning agility was also championed by the case study's Chief Executive Officer, who admitted that many of the experiences in the Lab hotels were new to him, and that he learned a lot from those experiences:

“We went out to {state}, where we spent a few days in [city] and where we also one morning sort of dispersed and went to interview some of our colleagues in different hotels around the [city] area, and also some guests. We started off at the [Lab hotel] with this guy who actually is directly responsible for the process by which the team at the [Lab hotel] is ending up with a completely unique front desk design. So I just wanna share this – I’ll try to keep it short but this is unbelievable to me because I learned a huge amount through this.” (Chief Executive Officer)

In the context of leadership skills, learning agility can be taken to refer not only to one's own learning, but also to the creation of an environment where knowledge is shared and others are encouraged to learn. One of the Lab hotels' Human Resources Directors recalled a situation where a housekeeping manager, who was considered to be one of the more successful lab leaders, exemplified this skill during a time when the design-thinking process was rolled out. First he learned the process himself, and subsequently transferred this knowledge on to others in his team, involving his coordinators more, and teaching them how to use the process.

The importance of learning agility was also covered by a number of writers in the Literature Review, such as Anatonacopoulou (1999) focusing on the understanding of managers' attitudes towards learning (i.e. 'learning managers'), Ellinger *et al.* (1999) describing the importance of managers as facilitators of learning in learning organisations, as well as Senge (1999) describing the importance of the ability to be 'ignorant and incompetent' to foster learning, as well as to be willing to collaborate and share knowledge.

Listening

Although it could be argued that the skill of listening is part of empathy, interviews clearly showed that it is seen as a critical skill in itself as well. One of the interesting results of rolling-out the design-thinking process at the Lab hotels was that it

encouraged leaders to listen to all their stakeholders: customers, employees and owners alike.

“There are people who they care about, they go out there and give you things that make you feel like you’re on top of the world. That’s one thing that I learned. The biggest thing for me that came out of the lab is listening to your customer, and to me our customers are not only the paying guests. (Corporate Vice President 3)

This key skill of ‘active’ listening came up in a number of interviews, and was considered critical by one of the Human Resources Directors who described a situation where his General Manager practiced this skill in a very active way:

“Not only does she listen to it, you can see that she absorbs it. And it comes up another time and in a practical use so you can see how my feedback got used. She teaches and she learns at the same time.” (Human Resource Director, Lab hotel 3)

In line with these findings, the importance of ‘listening’ was also outlined by Senge (1999) in his article about ‘learning leaders’, as well as Brownell (2008), who argued that leaders that are good listeners promote and create trust with and between employees, therefore fostering a learning environment that allows for knowledge transfer, which is one of the basic processes of a learning organisation.

Openness

Another common perception among the respondents was that having an open mind-set, defined by them as being open to new ideas and having the ability to think outside of the box, could be considered as one of the starting points or a pre-requisite to learning and innovation. It could also again be argued that openness or being open-minded is an innate personal characteristic, and that some people are naturally predisposed to being more open-minded than others. But it was also seen as important that leaders foster openness, whether they are naturally open-minded or whether it is a learned skill or behaviour.

“... I think, with the innovation process anybody can be innovative. You just have to have an open mind and go with the flow [...] go with the flow and be

willing to take chances and have an open mind to it. So rather than just being focused on somebody else, you also have to focus on yourself and how you can do that, what you can do to make a difference, so kind of shifting a little bit.”
(Middle Manager Focus Group participant, Lab hotel 1)

In line with those findings, ‘openness’ was also addressed by a number of writings in the Literature Review, such as by Senge (1990) describing the ability to challenge prevailing mental models, Antonacopoulou (1999) valuing openness within the context of being open to challenge the status quo, as well as Nevis *et al.* (1995) emphasising the role of leaders in creating a climate of openness, and the mind-sets of being open to proposed change.

Participation and involvement

Participation and involvement is one of the key premises of the learning organisation model (e.g. Watkins and Marsick 1993, Pedler *et al.* 1997). Getting others involved and to participate in projects and decision-making was also considered important by the interview participants in the case study organisation, mainly in terms of promoting the requisite change, alongside with empathy and listening.

“I think from an employee perspective, there had been many employees that have been really involved in some of the processes and will continue to be involved in processes as we move forward. We got a new project coming up in housekeeping that I’m excited about and it’s involving the employees and getting their ideas and opinions about what’s going to make their lives easier to take care of our customers.” (General Manager, Lab hotel 2)

The above quote came from a General Manager from an unionised hotel, where involvement of employees was seen as critical in getting buy-in, have everybody benefit from learning experiences, and fostering engagement.

“We initially started with the engagement survey questions and asked them to select a couple questions that were important to them and we sent our invitations to close to 80 different associates, probably had 50 at the first meeting. They selected ‘supplies’ and they selected ‘my supervisor cares’. And then we began to brainstorm and it’s really neat to see this process unfold and

how it's really impacted the employees because they really feel like they have ownership in the whole process.” (Human Resource Director, Lab hotel 1)

The above example referred to an initiative launched at one of the Lab hotels around improving working conditions at the hotel, using the case study organisation's engagement survey as a tool. The fact that leaders didn't just take decisions without involving their employees reportedly resulted in a lot of participation in the improvement process.¹⁷

“We had all of the corporate brass here. And we were very busy in the hotel too, sold out, with other things going on. And so [manager name] came in on the Friday of that LAB launch week and he brought in his entire department to the kick-off meeting. And you could just see him when we started talking about the LAB and he was just so proud. And what was really cool about it for me was that of everybody in the audience, it was so obvious that he had been talking to his group because they were all really like fixed on the conversation and they were really engaged and interested too.” (General Manager, Lab hotel 3)

A very emotional story told by one of the Lab hotel's General Managers, underlining the success of one of her managers who ensured that his team participated and was involved in the process from the beginning.

The framework presented in the literature review around the four, at times overlapping, categories of leadership roles, skills, styles and mind-sets proofed to be an effective framework in the analysis of the above findings. The results seem to suggest that that the majority of the above identified qualities that help leaders to create the conditions and structures characteristic of a learning organisation, describe mainly leadership 'roles' and 'mind-sets', and less the harder 'skills' or 'styles' of leadership, as outlined in the literature review. The following section will look at the other side of the coin, outlining some of the more unfavourable qualities of leaders to the creation of a learning organisation.

¹⁷ The data available can base this on leaders' accounts only. It is therefore not possible (methodologically speaking) to judge with certainty the extent to which the leaders did seek to engage employees, or the extent to which they were successful in doing so.

Leadership qualities unfavourable to the creation of a learning organisation

During interviews and focus groups, using the critical incident technique, participants were also asked to think about situations where leaders were not successful in coping with the rollout of and using the design-thinking process, thus potentially putting barriers in place for organisational learning. The two most prominent adverse qualities that came out of the interviews were ‘control’, and a ‘know-everything-attitude’.

Code Level 3	Code Level 4	Sources	References
Negative impact skills		7	36
	Control	5	12
	Collaboration	1	1
	Experimentation	1	2
	Emotional resilience	1	2
	Know everything	5	10
	Lack of empathy	1	1
	Lack of action	1	1
	Lack of learning	1	1
	Listening	2	2
	Power	1	1
	Problem solving	1	1
	Technical	1	1

Table 20 - Unfavourable leadership qualities

Control

As outlined by Harrim (2010) in the Literature Review, there is growing dissatisfaction with traditional management methods based on command and control, and more participative leadership seems to be in demand. This seems to be in line with the findings from the case study interviews and focus groups, where ‘excessive controlling’ was viewed by many as the most inefficient quality or disposition a leader could possess in support of the design-thinking process.

“I find that leaders that try to be controlling, that are not open to other ideas, are not strong leaders because what they are doing is they are making the organisation the same again and again.” (Corporate Vice President 3)

Another example is the quote below from a Corporate Vice President, referring to the implementation of a new performance management process, and demonstrating how an over-controlling group of leaders represented a barrier to the successful rollout:

“But my biggest pushback, which was surprising, was my HR directors, who previously controlled the process, really controlled what you used, when they did it, pretty much everything. And we built the system to be not HR dependent. A lot of our hotels don’t have HR. In fact, most of them, less have HR than don’t. So we had to build it that it’s very manager driven, and managers taking accountability for the folks that work for them. And the HR directors became my biggest obstacle through the rollout. They didn’t understand why they didn’t have a manual and control.” (Corporate Vice President 1)

A number of interview participants described excessive control as an old-school leadership skill, which was passed on from one leadership generation to another. Leaders still have to be able to exert some control over some things, and control can still be a valuable skill when exercised judiciously; but a tendency towards excessive controlling behaviours may not be conducive to coping with change. In addition, such a non-progressive leadership approach does not seem to resonate well with the new generation of leaders being hired into and developed in organisations:

“I don’t think that today’s managers or potential leaders are attracted to somebody that micromanages them. You want to have the opportunity to bring your own personality to the job.” (Corporate Vice President 4)

Excessive control is not only a potential barrier as a result of leadership behaviour, but also as a result of how processes are structured in an organisation. A number of conversations have taken place within the case study organisation around how processes could be simplified, removing the control aspect on many occasions, and allowing leaders to spend more time with customers and employees rather than controlling others. The quote below addresses both problems: leadership and process.

“One of the examples I’ll give you to back this notion up, is that throughout the Lab hotels there were conversations about too many brand standards tying our employees up to a certain script, this and that. One of our senior leaders in [city] said, ‘oh no, we cannot get rid of these. We cannot tweak the standards,

we cannot change the scripts, and people need to be told what to do, how to eat, how to walk and how to talk'. When we said, well allow them to work on their own, we heard back 'oh, I'm scared, this isn't going to work'." (Corporate Vice President 3)

The above is a fairly typical example of how a leader is not willing to give up control, and of a number of controlling processes that may hinder learning and advancement towards a learning organisation model, supporting some of the difficulties and critiques of the learning organisation expressed in the literature (e.g. Coopey 1995, Coopey and Burgoyne 2000, Keep 2000, Eijkman 2011, Owenby 2002).

Know everything

This might be seen more as a negative attitude than an ineffective skill, but it seems critical that managers and leaders can realise that they don't always know everything. It is really the opposite of learning agility and empathy, where a number of leaders feel that they don't have to learn anything, don't have to approach things differently, and don't have to learn how to lead and manage differently.

"I think it was a good thing for us because we learned the importance of getting customer feedback. I guarantee all of us in our careers have been told our whole life just go out there and make it happen. Just figure it out. So we go out there and we do the best we can. We make the decisions based on what we think is right and we don't talk to anybody else. I think it was very eye-opening to us that even though we've been in the business for 20 years or 25 or whatever it is, we don't know all the answers. It's important to listen to what the customer says and feels and thinks." (Senior Manager Focus Group participant, Lab hotel 1)

In an environment where individuals are expected to have all the answers and not make any mistakes, with leaders punishing failure and not tolerating an '*I don't know*' answer, this '*know-everything*' behaviour is consistently reinforced. The 'locker room project' in one of the Lab hotels was previously used as an example, but the below extract of a conversation during one of the focus groups showcases the impact of '*know-everything*' on the outcome of a project:

Participant 1: “No, I think so. I mean we’ve learned. I learned the hard way. Our general manager always gives an example that he and our director of engineering, between the two of them they’ve got probably 55 years of experience. That sounds right?”

Participant 2: “Yeah.”

Participant 1: “We redesigned the employee locker room. Never spoke to a single employee. We put things in it we thought we would like: a couch, a TV, a this and a that.”

Participant 2: “We don’t have a couch and TV in the ladies. I just want to point that out.”

Participant 3: “They forgot benches. They forgot...”

Participant 1: “Never even spoke to a woman to ask her what she wants in hers.”

Participant 2: “We just had to empty the lockers.”

Participant 1: “So, yeah. I think it can be taught. I think we’re all learning. That’s probably the most eye opening thing in this whole Project X¹⁸ for us is that’s the take home. You have to think. You have to redo the way you think through processes.”

(Senior Manager Focus Group, Lab hotel 1)

It is an illuminating example of a situation where senior leaders seemingly did not step back, did not accept that they don’t know everything, did not reach out to other stakeholders to get their input, and did not come up with better solutions that could be tested before they were implemented. The responses outlined above suggest that leaders should be aware of the impact of those two ineffective skills or behaviours, ‘excessive

¹⁸ Project X was a blueprint developed by the case study organisation’s innovation department, and within the above context referred to the Lab hotel concepts and design-thinking process roll-out.

control’ and ‘knowing all’, on their ability to foster learning, generate new ideas and foster participation and involvement overall.

Influence of wider organisational or environmental factors

During the interviews and focus groups, the interviewer also attempted to elicit factors that may have an impact on the implementation of the design-thinking process in Lab hotels, outside of leadership. Overall, very few wider organisational and environmental factors were mentioned. The only two factors that strongly emerged were the impact of high tenure of employees, and working in an unionised environment.

Code Level 2	Code Level 3	Sources	References
Influence of wider organisational or environmental factors		9	37
	Culture	1	1
	Day to day job	2	5
	Internal interest groups	3	4
	Organisation strategy	2	2
	Organisational values	1	1
	Personal characteristics	1	3
	Structure	1	1
	Team	2	3
	Tenure	5	9
	Unions	4	8

Table 21 - Impact of wider organisational or environmental factors

Tenure

Listening to the interview and focus group participants, creating Lab hotels and rolling out design-thinking in an organisation with high tenure, such as the case study organisation, could potentially be more challenging. As outlined earlier in this section, when discussing ‘tenure’ as being one of the barriers to organisational learning, high tenure with leaders that were mainly developed from within, can potentially inhibit learning and innovation, as explained by one of the Corporate Vice Presidents:

"I just feel that in our company mostly, because most of our people, our leaders are home-grown, I feel like they have very strong opinions about what they think

works and doesn't work. It makes them less susceptible to change or to be opened minded." (Corporate Vice President 3)

Earlier in this chapter, the results around the skill of 'adaptability' described a number of situations where General Managers adapted very well to the new environment and were successful in their quest to implement the design-thinking process in their Lab hotels. A number of those General Managers are leaders with high tenure, and this did not seem to impact on their ability to embrace those new concepts. Getting the buy-in of high tenure employees may require an extra effort from leaders, but many of the Lab hotel leaders were successful with this quest:

"I give her a lot of credit because she's dealing with people with a lot of tenure in the industry, you know: old dogs and new tricks. It takes a lot of convincing but I think she did a fantastic job of making sure she was inclusive, instead of saying 'you're going to do this because corporate wants us to do it'." (Human Resource Director, Lab hotel 3)

The impact of 'tenure' has already been discussed earlier in the section on 'Barriers', where it was identified as a wider organisational factor that could potentially influence organisational learning and leadership in a learning organisation.

Unions

The opinions around the impact of unions on the concept of a Lab hotel and the process of design-thinking were also split, with some participants arguing that working with unions can potentially inhibit the flexibility and creativity of individuals, and subsequently hinder learning and innovation.

"They have to conform to the little red book which is the local tool book, right? And they have to really just not deviate from that. [...] I can't go to an employee and say hey let me train you on how to do x. No you can't. So it would be a challenge." (Human Resources Director, Lab hotel 2)

The same argument is supported by another Human Resource Director, who describes some of the difficulties encountered in the past where any variation of an employee's job description involved renegotiations with the unions.

“So we’re at different evolutions of the project and they have a fundamental difference in terms that they are a union hotel which restricts them in a lot of the things that we can do they cannot. Or it’s going to be a little bit harder for them to produce. I could ask a housekeeper to bring a bottle of water to the room because we had a project that we’re trying out. You can’t do that in a union environment unless you have five different meetings and five different negotiations...” (Human Resource Director, Lab hotel 3)

The counter-argument would be that unions do not necessarily hinder learning, innovation and in this scenario the rollout of design-thinking in Lab hotels, as long as the right environment is created. This argument was defended by a General Manager who used to work in an unionised hotel, who felt that anything was possible as long as there was this environment of trust between the unions and the hotel management:

“So everybody knows that we’re doing something, right, that something’s happening. Somebody’s listening and that ‘the lights are on and nobody’s home’ is not happening. So that again goes back to that trust piece so when you ask me about if I’m a union or a non-union hotel, it’s about trust.” (General Manager, Lab hotel 3)

The Banquet Manager in one of the Lab hotels also agreed that unions did not necessarily stifle innovation or progress, with innovation in this context mainly referring to questioning the status quo and fostering incremental improvement:

“Yes, and so coming here and, you know, you definitely - you prep more and people tell you about the union. You look at the collective bargaining agreement. Like, I think in all respects a lot of my, in my department my guys are great at doing innovations like figuring out new ways - I mean, it might be on a smaller scale in respect of a banquet set or, like, a buffet set or something like that but the innovation, I think, is still pretty amazing for having a union hotel. There’s no, like, especially here, I haven’t heard much of a ‘No’ or a ‘I don’t think we can do that’ or something like that in my department. I would say that innovation is not that difficult and also I think that, especially in my department, I don’t think the union has prohibited that much.” (Middle Manager Focus Group participant, Lab hotel 1)

It seems that unions, like tenure, may impact how individuals are brought on board to support new concepts and processes, but that the creation of an environment conducive to learning and innovation in itself actually might assist this co-operative approach.¹⁹

As outlined in the document analysis earlier, the case study organisation has gone through a major re-organisation with the goal of making the organisation more nimble and responsive to change. This would converge with the argument of Popper and Lipshitz (2000) that leadership alone may not be enough to increase organisational learning, as other organisational factors are at play as well, such as structural aspects. The dealing with unions did not emerge as an organisational factor in the literature, and not all interview participants considered it a major factor either, but it would certainly support the view of Appelbaum and Gallagher (2000) that different organisations will have to select different approaches to becoming learning organisations, based on their own circumstances.

¹⁹ This will depend as well on the approach adopted by the union, i.e. whether it is confrontational, cooperative or compliant.

Putting the results and findings into context

The opening section of this chapter described the design-thinking process, the case study organisation's intervention that was put in place in attempting to move closer to a learning organisation model. This level-setting was important, as this process was used as a proxy for investigating organisational learning during the research, interviews and focus groups.

The second part looked at phase 1 of the two-phase case study research: the findings from the survey and the document analysis. Those findings provided considerable evidence to conclude that the case study organisation could be considered an organisation on the journey of becoming a learning organisation, which was a basic premise in order to use the case study organisation as a research setting. The survey results also underlined and confirmed the importance of leadership in fostering organisational learning and the creation of a learning organisation.

The third part of the chapter outlined the findings from the individual and focus group interviews. The barriers and challenges described in the first section converge with much of the difficulties and critiques of the learning organisation expressed in the literature, such as the potential problem of organisations' focus on short-term profits rather than long-term strategies, cultural elements that inhibit learning, the impact of leadership and resistance to change overall. An interesting finding was that 'tenure', mainly referring to the high tenure of senior leaders in the organisation, was viewed by many participants as a potential barrier to rolling out a major change initiative such as design-thinking. Some of those barriers may be more difficult to overcome than others, but the interview findings also suggest that most of the tactics to overcoming challenges and barriers, such as the proposed changes to the selection process, are based on local initiatives by individual managers, rather than being part of the overall organisational change process. This seems to fit well in with the broader learning organisation approach of empowering managers to make the changes they think would be best for their particular function or department. Both quantitative as well as qualitative data was also collected to address the perceived value of the learning organisation concept in the case study organisation. The findings suggest that although the model of the learning organisation, encouraging empowerment and experimentation, is seen as valuable, but may come into tension with organisational requirements for at least some level of

standardisation to ensure consistent customer experiences; something often required in the hotel industry in which the case study organisation is operating.

The main part of the chapter described the findings around leadership skills, styles, roles and mind-sets, either conducive or unfavourable to the creation of a learning organisation. Ten common qualities of successful leaders were identified through the individual and focus group interviews, which were also widely referenced in the literature reviewed in the opening chapter. In the Literature Review, leadership skills or qualities described in the learning organisation literature were categorized into roles, skills, styles and mind-sets, although those groups overlap considerably and certain qualities could potentially fit into several categories. The qualities identified during the interviews and focus groups describe mainly leadership *roles* (e.g. change management, learning agility, listening and participation), and leadership *mind-sets* (e.g. adaptability, empathy, empowerment, experimentation, failure and openness), with fewer addressing leadership *skills* (e.g. coaching, empowerment) and leadership *styles* (adaptability), as identified in the Literature Review. In addition, the findings also drew attention to a number of less favourable qualities of leaders, or leadership *mind-sets*, such as ‘excessive control’ and ‘knowing everything’. These unfavourable leadership qualities are also in line with the difficulties and critiques of the learning organisation identified in the Literature Review, as previously discussed in the context of barriers to organisational learning. Apart from leadership, only very few wider organisational and environmental factors that could impact leadership and organisational learning were mentioned: the impact of high tenure of employees, as outlined under potential barriers towards becoming a learning organisation already, and working in an unionised environment. None of the two factors were explicitly mentioned in the literature, but addressed by a number of writers arguing that the path to become a learning organisation may look different for every organisation, based on the existing circumstances and environment.

The Source Classification Sheet, containing all information about individual and focus group interview participants, can be found in Appendix 13. The following concluding chapter is used to answer the research questions around the skills that help leaders to create the conditions and structures characteristic of a learning organisation in more detail.

Chapter 5: Conclusion

Introduction

The aim of this research was to identify the skills that help leaders to create the conditions and structures characteristic of a learning organisation, using a case study organisation in the international hotel industry. The literature review confirmed that writers have consistently, over the last thirty years or so, cited largely the same drivers for organisational learning and the learning organisation, namely that organisations such as the case study organisation still embark on such journeys do keep pace with the accelerated rate of change, technological advances and more globalised and intensified competition. The literature on the learning organisation is mainly prescriptive, presenting a number of different frameworks, such as Senge (2006), Pedler *et al.* (1997) and Watkins and Marsick (1993), along with the seminal work on organisational learning by Argyris and Schön (1978). These and other writers have emphasised the importance of leadership in creating and developing the conditions and structures characteristic of a learning organisation. But not only is there little consensus about a definition of the learning organisation concept (e.g. Garvin 1993, Grieves 2008, Eijkman 2011), or how to measure organisational learning and the learning organisation (Garvin 1993), writers also describe successful leadership in learning organisations differently in terms of roles, skills, styles or mind-sets. The learning organisation concept and literature therefore is not without its critiques, with a number of writers arguing that the concept may not apply universally to all organisations based on their specific circumstances (e.g. Keep 2000, Brown and Keep 2003), or might lead to coercive persuasion and exploitation of the workforce (e.g. Coopey 1995). Some of the critiques also viewed the learning organisation's perspective on leadership as overly prescriptive and unitarist, arguing that the impact leaders and managers can have on the creation of a learning organisation might either be constrained or enabled by the broader organisational environment, and that a whole range of different managerial or leadership skills are likely to be necessary. These issues in the literature pointed to areas of ambiguity or uncertainty; areas where this study aimed to bring some measures and clarity – particularly with regard to the skills and qualities required of leaders in the development of a learning organisation. Another potential gap in the literature was the limited availability of research about the learning organisation and organisational

learning in the hospitality industry overall, as well as in the hotel industry in particular, which raises of course the question whether those concepts would be perceived as value-adding or not within the context of the industry. Through the above review, a number of research questions were developed, based on the main research aim of this study to investigate what the qualities are that make leaders successful in an organisation that embarked on the journey of becoming a learning organisation.

Barriers

- *What barriers and challenges do leaders within the hotel industry face in the process of moving towards becoming a learning organisation (e.g. politics, resistance to change, organisational culture, other leadership, lack of commitment, funds, etc.)?*
- *How successful have leaders in the case study organisations been to overcome some of the barriers and critiques raised about the concept of the learning organisation?*

Leadership

- *What leadership skills are conducive to the creation of the conditions and structures characteristic of a learning organisation within the hotel industry?*
- *Are those leadership skills influenced by the wider organisational context (e.g. culture, power relations and organisational structures) or environmental factors (e.g. economy, competition)?*

Hospitality and hotel industry

- *Is the learning organisation a concept that can be applied to the hotel industry? How useful is it, and would the concept be according to 'text book'?*
- *Are the leadership skills that are conducive to the development of a learning organisation different in the hotel industry then they would be anywhere else?*

The research was conducted based on a two-phase case study design, using a mix of predominantly quantitative methods during the first phase to provide baseline data about the extent to which the case study organisation had progressed towards a learning organisation model, followed by a second phase using qualitative methods in the form

of interviews and focus groups to elicit what made leaders successful in such an organisation, looking at their skills, roles, styles or mind-sets. The quantitative survey data was analysed in statistical format based on the responses received and compared to normative data from the Dimensions of the Learning Organization Questionnaire (Watkins and Marsick 1997). A document analysis was also conducted, with the aim of adding weight and detail to the picture emerging from the above survey data. After having collected and transcribed the field data, the researcher started the coding process of the qualitative data by breaking it down into suitable categories and sub-categories, and classified the information accordingly. Template analysis, a variation of thematic analysis, was chosen to analyse the qualitative data from the interview and focus group transcripts, with an initial template constructed around a number of a priori themes, based on the research questions developed in the literature review. Following an iterative process, those themes were further refined and organised into several levels where necessary and qualitative data was coded accordingly. Research findings were presented in the same way, following the themes identified above.

The aim of this Conclusion chapter is to tie together the different parts of the research, to add meaning to it, and to provide answers to the above stated research questions in particular. The first part of the conclusion chapter is a synthesis of the findings to address the latter, following the structure of the main themes identified in the findings and results chapter: barriers to organisational learning, the impact of leaders, and organisational learning in the hotel industry. This part will be crucial to set the context for answering the overall research question, providing a conclusion to the whole research effort. This chapter will also identify implications for both theory and practice, highlight some of the study's limitations, present a review of the methodology adopted, and provide areas or direction for future research.

It is contended that the study contributes to knowledge on a number of levels: first, it is a study about organisational learning and learning organisations in the hotel, as well as the wider hospitality industry, also aiming at evaluating the value of those concepts. This is fairly unusual as based on the literature review only few studies addressing those concepts have been conducted in this industry. Second, the methodology with a two-phase case study design was also different from many other studies, using a quantitative survey to establish the level of learning organisation of the case study organisation, before proceeding with more qualitative methods to gain a greater insight into

leadership. Thirdly, the study researched leadership around an actual organisational learning intervention, the design-thinking process, which rooted the research in an on-going real-life organisational development initiative. And finally, the research also added further depth to the study field of leadership in learning organisations.

The case study organisation has embarked on a journey towards becoming a learning organisation, prompted by similar drivers as identified in the literature such as the globalising economy (e.g. Harrim 2010, Chinowski *et al.* 2007), the rapidly changing business environment (e.g. Soon *et al.* 2009, De Geus 1988), increased competition and the need of companies to evolve to stay ahead (e.g. Soon *et al.* 2009, Harrim 2010), exponential technological advances (Park 2008, Harrim 2010), and the changing workforce (Chinowsky *et al.* 2007). This change in strategy, to become more agile and adaptable as an organisation in order to move out of the ‘sea of sameness’ as quoted by the case study organisation’s Chief Executive Officer, required certain leadership skills and qualities to evolve the case study organisation’s culture accordingly. Those leadership skills were studied following Nyhan’s *et al.* (2004) model outlining that ‘organisational learning’ and ‘learning organisation’ represent two sides of the same coin, with ‘learning organisation’ representing the goal to be achieved, and ‘organisational learning’ as the process to achieve this goal. The intervention designed to effect this strategic change is called design-thinking, and it is this vehicle through that the case study organisation has attempted to promote organisational learning and a shift towards a learning organisation model. Design-thinking, as applied by the case study organisation, is rooted in the effort to foster innovation ‘by design’ (e.g. Gaynor 2002, Tim Brown 2008, 2009), or through a structured process, and portrays innovation as a process to identify the unique needs of customers or employees, and create equally unique solutions for them. The study focussed primarily on the implementation of this intervention and the skills of those involved.

Answering the research questions

This section is a synthesis of the Results and Discussion chapter to answer the research questions. The chapter is structured around the main themes of the findings: barriers to organisational learning and becoming a learning organisation, the impact of leaders in learning organisations, and the learning organisation concept in the hotel industry.

Barriers

What barriers and challenges have leaders faced in the process of moving towards becoming a learning organisation (e.g. politics, resistance to change, organisational culture, other leadership, lack of commitment, funds, etc.)?

The barriers the case study organisation has encountered in its attempts to move towards a learning organisation model are largely consistent with what is written in the literature. The main barriers identified are outlined in Table 22 below:

Corporate initiative	The concept of innovation, and processes such as design-thinking, could potentially be viewed simply as corporate initiatives rather than long-term change strategies.
Culture	The current culture would have to evolve first towards a 'learning-supportive culture', adapting the work environment, processes and leadership.
Leadership	Current leadership behaviours often do not support experimentation and learning.
No change	Inertia, or lack of willingness to change, to accept change and to manage change.
Tenure	High tenure can present a barrier, and organisations with high tenure (especially in leadership) need a different approach to manage change.

Table 22 - Barriers and challenges

One was the danger of organisations viewing long-term change strategies as short-term initiatives (e.g. Keep 2000, Grievies 2008) as evidenced by the feeling of participants that the design-thinking process could be viewed as a corporate initiative only. As this

research did not include any longitudinal data, it was not possible to evaluate the empirical merits of this argument.

Issues of power and control (e.g. Coopey 1995) were also evident and mentioned in a number of interviews, addressing power struggles between key stakeholders. Different opinions by senior leaders on how organisational learning and innovation should be brought into the case study organisation slowed down the roll-out of the design-thinking process, and therefore could be seen as potentially hindering the case study organisation's process of moving towards becoming a learning organisation. Other leadership skills that are either supporting or hindering an organisation to move forward on the path of becoming a learning organisation are discussed in the following sections of this chapter.

Cultural barriers (see Eraut *et al.* 1997 and Slater and Narver 1995) also emerged as one of the key themes from the interviews and focus groups, with a number of participants questioning whether the organisational culture was ready to foster innovation and organisational learning. Many respondents felt that conformity was valued above experimentation and failure by leaders in the organisation; processes were overly heavy and complicated, and standards too prescriptive to create the right environment for organisational learning. Tenure was also identified as a potential barrier to organisational learning; many managers and senior leaders have been with the company for two to three decades, and often seem to be more reluctant to challenging the status quo and fostering continuous change and improvement.

How successful have leaders in the case study organisations been to overcome some of the barriers and critiques raised about the concept of the learning organisation? What practical steps has the case study organisation taken to overcome barriers and critiques of the learning organisation?

Not having followed the case study organisation over a longer period of time, answering those two questions may require additional research as outlined in the 'implications for future research' section.

Chinowski *et al.* (2007) presents a maturity model for learning organisations, arguing that this transformation required investment in all levels of learning, i.e. individual, group and organisational learning, as well as other underlying characteristics such as

leadership, processes and infrastructure, communication and collaboration, education and culture. The various tactics and strategies that emerged from the interviews and focus groups are very much in line with what Chinowski *et al.* (2007) present, but their effectiveness is not fully visible at this point. As an example, one of the most cited tactics was the review of the selection process, as well as the on-boarding or induction of new managers and leaders. These tactics are helpful in bringing in the leadership skills and qualities that have been identified in this study as being favourable to the creation of a learning organisation, or explicitly spelling out the roles leaders are expected to play in support of organisational learning and innovation, but whether those tactics actually worked and prompted a culture shift was outside the scope of this research.

The findings from the quantitative survey give a good indication of the importance leaders, and that leaders in the organisation had significant success in overcoming some of the barriers and critiques, and that the case study organisation is indeed an organisation well advanced in its journey of becoming a learning organisation. This is based on the results from the Dimension of the Learning Organization Questionnaire, which suggests that the organisation is relatively advanced in terms of its attainment of the learning organisation standard based on Marsick's model (Watkins and Marsick 1996), and the outcome of the document analysis which added weight and detail to the picture emerging from the above survey data. As outlined in the document analysis, and supported by the interviews and focus groups, the case study organisation's Chief Executive Officer explicitly communicated the necessity for change to all organisational members, explaining the need for the organisation to become more agile, flexible and adaptable if they wanted to 'break out of the sea of sameness' as he put it. He also linked this to the need to become more empathetic towards customer and employee needs and emotions, and the subsequent requirement of having the right structures and process in place. The two single biggest steps the case study organisation took were to re-organise their corporate functions and geographical structure, and to implement a process (i.e. the design-thinking process) that would allow all employees to participate, experiment and learn. The design-thinking process was a deliberate strategic intervention adopted by the case study organisation to foster continuous learning and improvement, and there was a conscious commitment by senior leaders to evolve the

case study organisation's culture by rolling-out this process across all properties globally.

Although not all organisations are looking at becoming a learning organisation, or to compete based on a 'high skill / high quality' model grounded in continuous learning and improvement (Ashton and Green 1996, Keep 2000, Keep and Rainbird 2000), the findings of the research showed that research participants perceived the learning organisation concept as a valuable concept for the hotel industry, and relevant for the case study organisation. For level-setting purposes, the researcher used Watkins and Marsick's (1996) model of the learning organisation based on the different levels of learning, which was outlined and explained in the introduction to the survey.

Impact of Leaders

What leadership skills are conducive to the creation of the conditions and structures characteristic of a learning organisation?

The literature review outlined the importance attached to leadership in a learning organisation context, which has been emphasised by a number of writings. For analysis purpose, those qualities were categorized into four at times overlapping groups describing a number of different leadership roles, skills, styles and mind-sets conducive to organisational learning or the development of a learning organisation. It is perhaps here that the study makes its greatest original contribution to the existing research on the learning organisation. The coding of interview data resulted in the identification of a total of 33 potential leadership skills or qualities that respondents felt would make a leader successful in creating the conditions and structures characteristic of a learning organisation. Out of this, a total of 10 leadership skills viewed as conducive to the creation of the conditions and structures characteristic of a learning organisation could be identified (Table 23), being mentioned consistently across a number of participants (i.e. sources) in several contexts (i.e. references).

Adaptability to changing circumstances
Change management in service of continuous improvement
Empathy to understand the needs and concerns of others
Empowerment of employees to make decisions and take independent action
Encouraging Experimentation to foster learning and innovation

Rewarding fast and frequent Failure
Learning agility to demonstrate commitment to own and others' learning
Active Listening and acting on feedback
Openness to diverse viewpoints
Fostering active Participation and involvement

Table 23 – Leadership skills conducive to the creation of a learning organisation

Looking at those leadership skills from the perspective of the four categories used during the Literature Review, an interesting finding is also that playing the right ‘roles’ and having the right ‘mind-sets’ seem more prevalent in creating the right environment or culture for learning on all levels, than possessing specific ‘skills’ or applying specific ‘styles’ (see Table 24 below).

	Adaptability	Change Mgt	Empathy	Empowerment	Experimentation	Failure	Learning Agility	Listening	Openness	Participation	Coaching	Collaboration	Trust
Roles													
Skills													
Style													
Mind-set													

 = 1st most referenced
  = 2nd most referenced

Table 24 – Leadership Roles, Skills, Styles and Mind-sets

An explicit distinction between leadership skills, styles, roles and mind-sets (a framework presented in the literature review and used throughout the study), and a comprehensive model of the leadership skills conducive to the creation of a learning organisation as outlined above is new to the literature of the learning organisation. The individual leadership skills elicited from this study are not unique as such, but were described in a number of different studies. For example, the findings of this research are consistent with Antonacopoulou (1999), who argues that leaders should create an environment that not only facilitates learning, but also encourages and rewards it. This is more of a role or mind-set for leaders across the organization, recognizing the need for learning and engaging actively in learning themselves as well, providing feedback,

reviewing performance, tolerating mistakes and challenging continuously the status quo. The findings are also aligned with Marquardt's (2000) view of the learning organisation, stressing the importance of creating an environment where people are allowed to take risk and experiment without fear of punishment. Managers and leaders should be able to tolerate mistakes when individuals are applying new skills during learning periods (as advocated by Tannenbaum 1997), if they want to foster a climate or environment where learning and innovation can take place.

On the other hand, many of the leadership 'skills' and 'styles' described in the literature are rather generic skills of leaders, e.g. influencing, motivating, coaching, empowering, communication, and not necessarily unique to an organisation that wants to foster organisational learning and innovation. This could well be the reason why they did not emerge more from the interview and focus group data, as the interview protocols were focusing on leaders' skills and qualities within the context of implementing the design-thinking process, and of organisational learning.

Are those leadership skills influenced by the wider organisational context (e.g. culture, power relations and organisational structures) or environmental factors (e.g. economy, competition)?

Although power relations seem to have impacted organisational learning in the case study organisation, as outlined earlier in this chapter under 'barriers', and structural changes were addressed during the re-organisation within the case study organisation, not many other contingent factors were identified during the research. The respondents were consistent in arguing that there were a number of roles, mind-sets and skills or qualities that could be identified as being favourable for leaders to create the structures and conditions characteristic of a learning organisation, irrespective of any organisational influences.

The interviews were focusing heavily on one specific intervention, the design-thinking process, which may have narrowed respondents' perspectives and guided them away from considering wider organisational influences such as the organisation's overall purpose, culture and strategic objectives. One example would be that the case study organisation is a hotel company, which by nature requires more customer-relation skills than another company may need. Although becoming a learning organisation may be

part of an organisation's main strategies, each organisation will have other strategies in place that may influence the kind of leadership they want to have, develop or bring into the organisation.

Hospitality and Hotel Industry

Is the learning organisation a concept that can be applied to the hotel industry? How useful is it, and would the concept be according to 'text book'?

Although the hospitality industry, and in particular the hotel industry, is generally bound by more traditional work and employment processes compared with other industries (Teare and Bowen 1997), many of the drivers attributed to the emergence of the concept of the learning organisation are as much applicable to the hospitality industry as to other industries.

Technological advances have also impacted the workplace, with more and more information systems being deployed. Jobs and roles have changed across all functions in the hotel industry, due to the systematic roll-out of computerised property management systems, yield and revenue management systems, reservation systems and much more. Whether a hotel worker in general can be labelled 'knowledge worker' according to Drucker's (1988) definition could be questionable. This might apply to a number of roles but certainly not all, but those roles are on the rise which impacts the way hotel companies recruit these days. In this respect, the hotel industry therefore is perhaps not fundamentally different from other industries, with employees having to learn and work faster due to the exponential rates of change in the workplace (Marsick and Watkins 2003).

Competition in the hotel industry is also growing in most markets. This does not seem to be a new challenge for the case study organisation, but competition has intensified over the past years, with many other hospitality companies adopting similar aggressive expansion plans²⁰. The case study organisation's quest to get out of the 'sea of

²⁰ Note from the researcher: a number of large, global hospitality companies are competing in similar markets for similar customers with similar products; thus the stated need for differentiation.

sameness', as quoted by their Chief Executive Officer, was a clear driver to become more agile, adaptable and innovative as an organisation.

Using Watkins and Marsick's (1996) 'Dimensions of the Learning Organization Questionnaire' (DLOQ), the results indicated a positive perception of members of the case study organisation relative to the adoption of those dimensions of the learning organisation and performance outcomes as a result of it, and the case study organisation therefore seems to be on the journey of becoming a learning organisation.

On the other hand, a number of interesting quotes were highlighted in the Results and Discussion chapter, suggesting that although the respondents perceived the concept as valuable, there seems to be some ambiguity or limitations of the learning organisation concept in the hotel industry. Within the case study organisation, there was confusion about the outcome of rolling out the design-thinking process, and in particular what 'innovation' really meant for the organisation. One of the respondents commented on the fact that the case study organisation was not Apple or Google, and that innovation was not about finding the break-through product but more about continuous incremental improvement.

Another observation linked to the above is that as a model, the learning organisation encourages empowerment and individual experimentation. However, this may come into tension with organisational desires or requirements for at least some level of uniformity, standardisation and predictability; and such standardisation may be more often required in the hotel industry to offer a consistent experience to guests. Also, while not mentioned explicitly by any of the research participants, some of the particularities of the hotel and the wider hospitality industry, such as high turnover and fluid labour markets, may be impeding factors in the development of a stable learning organisation. Both above points may have an impact on the current theory around the learning organisation, as outlined later in this chapter.

Are the leadership skills that are conducive to the development of a learning organisation different in the hotel industry then they would be anywhere else?

The findings from this research suggest that the specific leadership skills conducive to the development of a learning organisation seem to be fairly universal, and not significantly different in the hotel industry. But the research has also shown that other

skills or qualities are important in the case study organisation, which are not necessarily linked to organisational learning and innovation, but rather to the strategic objectives of the company. 'Innovation' and 'learning' can be defined differently in different organisations, based on their strategic objective (e.g. Kulesa 2007). The hospitality industry is generally still bound by more traditional work and employment processes compared with other industries, even within the service sector (e.g. Teare and Bowen 1997), and breakthrough innovation would not necessarily be seen at the front-end of the agenda. The expectations in the case study organisation, as revealed during the interviews, are more around continuous improvement and incremental change, agility and adaptability to change, and about sharing ideas and best practices. This would probably make the hotel, and possibly the wider hospitality industry a little different and as mentioned earlier have an impact on the theoretical models of the learning organisation in this industry, but the skills to foster a culture of learning and innovation identified in this research are not very different from what the different writings on leadership in learning organisations outlines and therefore will look similar in different industries.

Overall research conclusion

The design-thinking process was developed with the stated purpose of fostering learning and innovation in the case study organisation, and provoked some considerable paradigm changes how leaders had to lead and behave as leaders. Following Nyhan's *et al.* (2004) concept that 'organisational learning' and 'learning organisation' represent two sides of the same coin, with 'learning organisation' representing the goal to be achieved and 'organisational learning' being the process to achieve this goal, the design-thinking process therefore represented suitable context within which to explore which skills would make leaders successful in the process of fostering organisational learning and innovation, within an organisation that could be described as being on its journey of becoming a learning organisation.

While the aim of the research following the literature review was to investigate the skills that make leaders successful in such an organisation, the findings pointed more to 'roles' and 'mind-sets' of leaders when it comes to fostering learning on all levels. Most of the literature reviewed lists rather generic skills and styles of leaders, whereas this study points towards more focused roles and mind-sets of leaders that help create this environment where risk taking, experimenting and learning from failure, is encouraged and also rewarded (Antonacopoulou 1999). On the other hand, writers such as Garvin (1993), without explicitly describing the role of leaders in an organisation, already emphasised the importance of creating a learning culture as one of the critical issues that need to be addressed before an organisation can even embark on the journey to become a learning organisation.

Shifting a leader's mind-set from *no mistakes* towards *tolerating experimentation and failure*, from *control* to *participation*, and from *I know it all* to *empathy*, represents a major change in mind-set, but this has been identified as key in this study for them to be successful in fostering organisational learning and innovation. It therefore seems that what makes leaders successful is the ability to create the right climate or a 'learning-supportive culture' (Bishop *et al.* 2006) where such learning and innovation can take place. This naturally raises all kinds of questions around whether such a culture is something an organisation has or is, or whether it is something that is imposed by the organisation's leaders (Bishop *et al.* 2006). A discussion about how culture should be viewed is beyond the scope of this study, but the findings of this research did show that

learning and innovation are a deliberate strategy of the case study organisation, along with a number of other strategic key initiatives, and that successful leaders are the ones who can help in shaping and creating this climate or culture.

As outlined in the Results and Discussion chapter, senior leaders in the case study organisation seem to have recognised that there was a need to evolve the organisation's culture to becoming more supportive of organisational learning and innovation, to put the right structures in place, and to ensure that leaders play the right roles and have the right mind-set to support this evolution. The findings of this research outlined what roles successful leaders should play and what mind-sets they should exhibit in the creation of such a 'learning-supportive culture'. The interviews reflected some of the previous, and in some instances current, thinking in the case study organisation, which was often anchored in 'quality' thinking, characterized by perfection and low tolerance of mistakes²¹. Conformity and perfectionism were highly valued, thus inhibiting risk-taking and experimentation out of fear of failure. The case study organisation, in implementing the design-thinking process, expressed a desire to move away from such convention and shift towards a different competitive approach, which, according to respondents, involved re-aligning its organisational structure to foster collaboration, and promoting different leadership behaviours to provoke this culture shift.

A number of barriers towards becoming a learning organisation have been described in the literature (e.g. Chinowski *et al.* 2007). The biggest challenge identified by participants was the danger of interventions targeted at organisational learning could potentially be seen as superficial 'corporate initiatives', which may stay for a couple of months or years but then go away again. This is again consistent with the emphasis on the creation of a learning-supportive culture, where interventions such as design-thinking would not be seen as corporate initiatives anymore, but as processes supporting the culture shift. Having the full senior leadership team of an organisation aligned and sending a common message to the rest of the organisation was also seen as critical, as participants identified 'conflicting internal interests' and 'power relations' as potential barriers towards becoming a learning organisation as well.

²¹ See for example points raised in 'Culture' under 'Barriers and Challenges' in the Results and Discussion chapter.

The re-organisation initiated by the case study organisation's Chief Executive Officer was seen as a first step to put the structures in place that would allow it to become more agile and adaptable to the environment, and prepare the grounds for interventions such as design-thinking that have the goal to foster participation, involvement, innovation and learning. The next steps will focus on re-designing structures further down in the organisation, and new processes that will assist in 'taking work out of the system' – all with the objective to become less rigid, and encourage better knowledge sharing across the organisation. By re-designing the organisation's structure, and launching interventions such as design- thinking, the case study organisation tries to follow Nyhan's *et al.* (2004) success model to create a learning organisation. As evidenced in the findings from the DLOQ survey, the case study organisation could be described as being on a journey towards becoming a learning organisation, and a number of roles and mind-sets of successful leaders that can support this strategy have been identified during the interviews and focus groups. As the research took place in the early stages of this journey, it will be a task for future research to determine what impact leaders have had in creating a 'learning-supportive culture' as time passes.

Implications for theory

In the literature review, a number of frameworks of the learning organisation were examined, such as Senge (2006), Pedler *et al.* (1997) and Watkins and Marsick (1993), along with the seminal work on organisational learning by Argyris and Schön (1978). The design-thinking process introduced as an intervention in the case study organisation seems to reflect many of the principles of ‘double-loop learning’ proposed by Argyris and Schön (1978), where learning occurs by solving a problem and by addressing the problem’s root symptom, with the ultimate aim of resulting in higher level organisational learning through the organisation’s members or what Garavan (1997) termed ‘learning agents’. In Peter Senge’s (2006) framework of the learning organisation, built on the five dimensions or disciplines that are vital to build organisations that can truly learn, this looks very similar with his emphasis on generative and continuous learning and experimentation. Pedler *et al.* (1997) looked at the learning organisation concept from a more European perspective, describing the ‘learning company’ as a journey with a number of maturity stages based on a number of characteristics that need to be developed. One of those characteristics is a ‘learning-supportive culture’ (Bishop *et al.* 2006), which is very much in line with the findings of this research that the best leaders in an aspiring learning organisation are the ones who can create an organisational environment where people can experiment and learn from experiences. The last model reviewed was the one by Watkins and Marsick (1993), focusing on integrated learning on different levels: individual, team, organisational and system learning. This also matches Senge’s (2006) discipline of ‘team learning’, arguing that team learning is a prerequisite for organisational learning. This model adopted and, largely, accepted Watkins and Marsick’s (1993) model of the learning organisation, and therefore did not aim to affect a re-shaping of any particular model. Rather, the primary objective was to assess the skills perceived as important in being a leader within a learning organisation.

In the section ‘The Hospitality and Hotel Industry’ earlier in this chapter, a number of interesting points around the definition of innovation and organisational learning, as well as around the tension between individual empowerment and organisational desires for some level of standardisation, were raised. If organisational learning is not used for breakthrough innovation, it seems that the concept might be applied or manifested

differently in different industries, and that a separate theory or model of the learning organisation for the hotel, and possibly the wider hospitality industry would be needed.

There is also little consensus in the literature regarding what makes a successful leader in a learning organisation, with writers emphasising different leadership roles, skills, styles and mind-sets conducive to organisational learning. Those four categories were used from the literature review through to the analysis of results. The distinction between those categories may at times be blurry, and certain qualities may fall into more than one category, but it proved to be an effective framework to analyse the skills needed by leaders conducive to the creation of a learning organisation, and could potentially be used in other research settings as well. Although the literature review showed that only few writers seem to address the ‘contingent’ nature of leadership based on organisational and environmental factors, the findings of this study suggest that there are a number of key roles and mind-sets in leaders that are consistent to foster organisational learning, such as their role in creating an environment where learning can take place, people can experiment and learn from failure. The literature was also not clear about the distinction between skills of senior leadership and other leaders in the organisation. The case study organisation’s journey confirmed both the importance of senior leadership in setting ‘learning’ as one of the key strategies, but also of leaders at all levels of the organisation who are responsible in creating this ‘learning-supportive culture’ (Bishop *et al.* 2006). The findings of this study therefore suggest that although different organisations in different industries and with different organisational strategic objectives may require different leadership skills, there are common roles, attitudes and mind-sets of leaders supporting organisational learning that are potentially common across organisations and industries.

Due to the fact that the research was focused exclusively on the international hotel sector, this study does not allow any firm conclusion to be drawn about the impact of sectorial differences on the design and implementation of learning organisation models, and directly assessing such differences was never an aim of this research. However, it does suggest that, while specific leadership skills may differ between learning organisations in different sectors or circumstances, leaders’ broader roles and mind-sets with regard to organisational learning and the creation of a ‘learning-supportive culture’ (as described by Bishop *et al.* 2006) may be more constant.

Implications for practice

This research could be of special interest to human resource practitioners, especially in the hotel and possibly the wider hospitality industry as this field has been identified as being under-represented when reviewing the research literature. Processes in this industry are usually fairly traditional, and introducing some of the learning organisation concepts and the capabilities for employees to try out new things and participate could have a transformative impact on attraction, development and retention of talent. As previously mentioned, not all organisations would put organisational learning on top of their strategic agenda, but for those who are looking to become more agile and adaptable to change, who want to start doing things differently, have their employees participate and help them becoming more innovative and differentiated from the competition, the research findings may be helpful when looking at leadership selection and development.

Recruitment and selection of leaders, as well as leadership development, for such an organisation should take into account those mind-sets and roles as outlined earlier in this chapter (see Table 23), thus assisting in bringing leaders into the organisation that can role model the required behaviours. Having leaders that can create this environment where others can question the status quo, experiment, try out new things, fail and learn from their failures, is critical if an organisation wants to create a learning-supportive culture. In addition to the other skills and experiences required, interview questions should also be able to elicit those key behaviours related to organisational learning, and new situational or behavioural questions should to be added such as ‘Tell me about a situation where you have failed’ or ‘What was the most innovative idea you and your team had’. Leaders therefore should no longer be selected based on their technical skills only, or some of the more out-dated behaviours such as compliance and conformity, but on their ability to inspire others to experiment, learn and innovate.

When developing leadership models for recruiting, developing and assessing leaders in an organisation, organisations should not only include the technical skills, knowledge and experiences needed to run the business, but should also consider the key behaviours based on the roles and mind-sets as described earlier. Below is a model that could serve as a starting point to select critical leadership skills, and include them in an organisation’s leadership model. The relevant behaviours should be pragmatically

spelled out and integrated into the key human resource processes. The performance management process, for example, may have to be adapted to ensure that risk taking and experimentation is now rewarded and not reprimanded.

Adaptability	Adapts quickly to changing circumstances; enjoys the challenge of the unfamiliar
Change management	Identifies the strategies, resources, and actions necessary to move change forward; challenges the status quo in service of continuous improvement
Empathy	Seeks to genuinely understand the needs and concerns of others; asks questions to gain insight into true needs; accepts that one does not have all the answers
Empowerment	Unleashes employees and gets out of their way; entrusts others to make decisions and take independent action; celebrates the success of others
Experimentation	Encourages risk taking and experimentation to foster learning and innovation;
Failure	Creates an environment of trust where employees can fail fast and often; embraces and rewards failure; recognizes and applies lessons learned from past mistakes; views mistakes as opportunities to learn
Learning agility	Demonstrates commitment to on-going personal and professional development; takes personal responsibility for coaching and developing others; is able to be vulnerable and accept that one does not know everything
Listening	Listens more than speaks; practices active listening and uses feedback to act on what was heard
Openness	Has an open mind-set and the ability to think outside the box; values and encourages diverse viewpoints
Participation and involvement	Seeks input and collaboration from others; fosters participation and involvement and creates great teams

Table 25 – Example: Leadership Model conducive to the creation of a learning organisation

Interestingly, some of the preliminary findings of the research around the leadership skills conducive to the creation of the conditions and structures characteristic of a learning organisation were actually considered within the case study organisation, when

its HRM/HRD leadership was tasked with the development of a new ‘leadership profile’²². It was clear to the case study organisation’s CEO that with the transformation of the organisation, with the desire to evolve the culture to become more innovative and responsive to change, and with the roll-out of the design-thinking process to support this change, leaders had to change the way they lead. Although the development of this ‘leadership profile’ and the corresponding leadership behaviours were grounded in additional interviews conducted by the HRM/HRD leadership with a number of field leaders across the organisation, the findings from this research complemented the framework, which was to include those roles and mind-sets conducive to the development of a learning organisation. The new leadership profile thus looked very different from any previous model used by the case study organisation, valuing different leadership skills: it now included a few of those roles and mind-sets, such as empathy, learning agility, empowerment, experimenting, failing and learning from failure, adaptability and change management. The HR leadership in the case study organisation was instrumental in developing this new profile, and it has officially been rolled-out across the organisation in the last quarter of 2013, with the objective to prompt the culture shift over the coming years the case study organisation’s CEO was aiming for (see Appendix 14).

²² A nomenclature applied by the case study organisation, representing the essence of leadership in the organization.

Limitations

This research adopted a rather unusual two-phase case study design, and offers a rich insight into leadership in an organisation on the journey of becoming a learning organisation, and particularly into leadership skills that foster or hinder innovation and organisational learning. As a direct consequence of the methodology and setting chosen, the research encountered a number of limitations, which need to be considered. Most of them have already been outlined as part of the methodology chapter, in particular the case study design, generalizability, sampling procedure, participant access and the role of the insider-researcher. Those limitations have an effect upon the extent to which one can draw confident and representative conclusions on the basis of the present research data. This case study strived for theoretical rather than statistical generalisation (see Yin 2009, Mason 2009, Blaikie 2010), with conclusions that may not be universal, but potentially would be similar in other comparable organisations.

As a starting point, the literature review that introduced this study addressed the areas of learning organisation, organisational learning and leadership in learning organisation. The area of ‘knowledge management’, a concept that similar to ‘learning organisation’ addresses the intangible human assets of organisations, was not included as part of this study. The research looked at eliciting findings around leaders’ roles in fostering organisational learning, or the successful skills of leaders in a learning organisation, with an emphasis on continuous learning, development and innovation, and not at the more object-based concept of knowledge management, with its emphasis on identifying, capturing and storing knowledge (Scarbrough and Swan 2001).

One other limitation could come from the fact that respondents told what they were ‘thinking’ were the most important leadership skills for success in a learning organisation, i.e. the research might have found out what they ‘think’ the important skills are rather than what the important skills really are. The two are not necessarily the same thing. This could be an area for future research, comparing and contrasting two or more aspiring learning organisation and measure their differing levels of success and stocks of leadership skills based on a measure derived from this research.

As acknowledged earlier in this study, the sample used in this study was made up entirely of managers from the case study organisation. Thus, the researcher was not able

to obtain a perspective on how non-managerial staff felt about the culture of the organisation and whether there was actually any real change perceivable from their point of view (e.g. whether they really feel increasingly free to take risk, to experiment, to make mistakes, to innovate, to ask questions, to share knowledge, etc.). This represents an avenue for further research to explore.

One more limitation is worthwhile mentioning here. The research was conducted based on one intervention only, the roll-out of the design-thinking process, and did not include any longitudinal analysis with potential changes over time. At the time the research took place, this process was fairly new, and some of the leadership skills necessary to sustain organisational learning and innovation may have been different over time.

Implications for further research

Although the research findings are potentially applicable to other settings, there is a need for more case studies in different settings, different industries and different geographical locations to achieve more generalizable results and to assess the need for different learning organisation models in different settings or industries.

The research was conducted in the case study organisation during a time they were launching this new design-thinking process in their ‘Lab hotels’, i.e. in a limited number of business units where the organisation was testing new products and processes. This provided a great research ground to address the main research question, but the organisation had rolled this out at the time in 8 out of 500 hotels only. In the subsequent months, it was decided that this new process was to be implemented across the organisation, prompting an important culture shift from ‘compliance and conformity’ to ‘learning and experimenting’. It would be interesting to continue studying this case study organisation, and see whether different leadership skills were or will be necessary to support this culture shift.

The leadership skills identified in this study referred mainly to the implementation of the design-thinking process, which was taken as a proxy for organisational learning and the case study organisation’s commitment to become a learning organisation. It would be interesting to assess in a year’s time whether those skills and roles are really the ones which are valued in the organisation, and make leaders successful, or not. And if they are not, is this related to the organisation’s lack of commitment to learning or were other skills, roles or mind-sets were considered more important.

The case study organisation seems clearly to be on a journey to become a learning organisation, but many of the interventions, such as design-thinking, may be difficult to sustain. More longitudinal studies, researching how leaders are successful or unsuccessful in fostering organisational learning over time, would be beneficial in getting an even deeper understanding of the leadership skills that are essential to create the structures and conditions typical of a learning organisation.

During conversations and observations following the research, the researcher discovered a number of ‘political’ issues that could potentially impact the learning organisation journey of the case study organisation. Divergent opinions around what

‘innovation’ actually means, and who is responsible for innovation and learning, are slowing down the process. The research study was a snapshot of the process during one month, but it would be interesting to connect again with the case study organisation, and study the successes and failures in their approach.

One of the limitations outlined in the previous section was that the research might have found out what respondents ‘think’ the important skills are rather than what the important skills really are, and that the two are not necessarily the same thing. An area for future research could be to compare and contrast two or more aspiring learning organisation and measure their differing levels of success and stocks of leadership skills based on a measure derived from this research. The result could show if the organisation that was closest to attaining the learning organisation model was also the organisation that had the highest levels of important leadership skills. This could be a way of testing the conclusions of this research.

As outlined earlier in this chapter, the findings point towards the importance of leaders being able to create the environment where learning can take place on all levels, or what Bishop *et al.* (2006) calls a ‘learning-supportive culture’. Researching culture in a learning organisation was beyond the scope of this paper, but would represent an interesting aspect of how an organisation can evolve its culture to start or continue the journey towards becoming a learning organisation. Leadership will definitely play a part in this, but may not be the only lever an organisation should use to evolve or create such a learning-supportive culture.

Running the risk of defining the ‘best leaders’ too narrowly, following a case study research that strives for more theoretical rather than statistical generalisation, the findings of this study suggest that organisations embarking on the journey of becoming a learning organisation should consider valuing, developing and acquiring leadership skills and mind-sets as identified in this research (see Tables 23 and 25), as they will be faced with finding a way to create a learning-supportive culture where employees are involved and participate, are empowered to make their own decisions, and have trust in leadership in order to take risk, experiment and learn from failure. The study also revealed some interesting findings around the value and applicability of the learning organisation concept in hospitality. Despite the potential barriers an organisation in the hotel industry faces, such as high turnover, fairly hierarchical structures and tensions

about the definition and objectives of innovation and organisational learning, the findings suggested that the concept was considered as very valuable and that the case study organisation has been successful in overcoming many of those barriers. It is therefore suggested that the further research and the potential addition of a separate theoretical model of the learning organisation in the hotel and possibly the wider hospitality industry would be of value.

Appendices

Appendix 1: Measuring Organisational Learning and the Learning Organisation

Appendix 2: Leadership in Learning Organisations

Appendix 3: Blank copy of DLOQ used

Appendix 4: Invitation Letter

Appendix 5: Interview Guides (Focus Group and Individual)

Appendix 6: Coding Summary by Node Extract (Excel)

Appendix 7: Informed Consent Form (blank)

Appendix 8: Communication by CEO

Appendix 9: Leadership Expectations

Appendix 10: Performance Model

Appendix 11: Innovation projects

Appendix 12: Tenure (extract from CSR Report)

Appendix 13: Source Classification Sheet

Appendix 14: sample Leadership Profile

Appendix 1:

Measuring Organisational Learning and the Learning Organisation

The attached table outlines the various measurement tools and frameworks as elicited in the Literature Review, and categorises them according to Moilanen's (2001) and Chiva et al.'s (2007) classifications.

4 pages

Appendix: Measuring Organisational Learning and the Learning Organisation

Authors	Based on	Tool and description	Assessment	Moilanen (2001)				Chiva <i>et al.</i> (2007)	
				Archetype	Holistic	Profound	Tested	Aim	Conceptual
Pedler <i>et al.</i> (1997)	Own framework	The 11 Characteristics of the Learning Company	A learning Approach to Strategy Participative Policy Making Informating Formative Accounting and Control Internal Exchange Reward Flexibility Enabling Structures Boundary Workers as Environmental Scanners Inter-Company Learning A Learning Climate Self-development Opportunities for All	No	Yes	Yes	No	Capability	The learning organisation
Marsick and Watkins (2003)	Own framework	The Dimensions of the Learning Organization Questionnaire Seven dimensions measuring learning on individual, group and organizational level.	Individual Level of the Learning Organization 1. Create continuous learning opportunities 2. Promote inquiry and dialogue Team or Group Level of the Learning Organization 3. Encourage collaboration and team learning Organization Level of the Learning Organization 4. Create systems to capture and share learning 5. Empower people toward a collective vision 6. Connect the organization to its environment 7. Provide strategic leadership for learning	No	Yes	Yes	Yes	Capability	The learning organisation
Tannenbaum (1997)	Own framework.	Developed the 'Learning Environment Survey', a tool checked for validity and reliability, tested in several organisations. The tool is based on facilitators and	Assigns to provide opportunities to learn Tolerates mistakes as part of learning Assigns to avoid errors Accountability/high performance expectations Open to new ideas and change	No	No	Yes	Yes	Capability	Individual learning

Appendix: Measuring Organisational Learning and the Learning Organisation

Authors	Based on	Tool and description	Assessment	Moilanen (2001)				Chiva <i>et al.</i> (2007)	
				Archetype	Holistic	Profound	Tested	Aim	Conceptual
		inhibitors in the learning environment.	Policies & practices support training Supervisors support training Co-workers support new ideas Situational constraints to learning Awareness of big picture						
Goh and Richards (1997)	Nevis <i>et al.</i> (1995), Pedler <i>et al.</i> (1997), Garvin (1993)	The Organizational Learning Survey (OLS) Based on five major underlying organizational characteristics driving Organizational Learning Capability (OLC), based on literature review.	Clarity of purpose and mission Leadership commitment and empowerment Experimentation and rewards Transfer of knowledge Teamwork and group problem solving					Capability	The learning organisation
Moilanen (2001 and 2005) (*) author's own assessment	Senge (2006), Pedler <i>et al.</i> (1997), Argyris and Schön (1978)	The Learning Organization Diamond 10 elements Based on the definition of a learning organisation that looks at it as a whole entity, with both structural as well as human aspects of the company.	Five functions driving forces, finding purpose questioning empowering evaluating Two dimensions organization (managing) individual (leading)	No (*)	Yes (*)	Yes (*)	Yes (*)	Capability (*)	The learning organisation (*)
Bontis <i>et al.</i> (2002)	Crossan <i>et al.</i> 's (1999) 4I model	Developed the Strategic Learning Assessment Map (SLAM) to test the relationship between organisational learning and business performance. Based on three building blocks	Stocks Individual, group, organization level learning Process: Feed forward, feed backwards Supportive Learning Environment Psychological safety, appreciation of differences, openness to new ideas, time for reflection. Concrete learning processes and practices Experimentation, information collection,					Process	4I framework by Crossan <i>et al.</i> (1999)
Garvin <i>et al.</i> (2008)	Own framework								

Appendix: Measuring Organisational Learning and the Learning Organisation

Authors	Based on	Tool and description	Assessment	Moilanen (2001)				Chiva <i>et al.</i> (2007)	
				Archetype	Holistic	Profound	Tested	Aim	Conceptual
			analysis, education and training, information transfer Leadership that Reinforces Learning						
Nevis <i>et al.</i> (1995)	Own framework	Developed the 'Organizational Learning Inventory', enabling organisations to better understand their learning capabilities.	Seven learning orientations Knowledge source Product-Process focus Documentation mode Dissemination mode Learning focus Value-chain focus Skill development focus Ten Facilitating Factors Scanning imperative Performance gap Concern for measurement Experimental mind-set Climate of openness Continuous education Operational variety Multiple advocates Involved leadership Systems perspective						
Chiva-Gomez (2004)	Nevis <i>et al.</i> (1995), Pedler <i>et al.</i> (1997), Tannenbaum (1997) Goh and Richards (1997)	Developed a summary of 15 factors that facilitate organizational learning, based on literature review.						Capability	The learning organisation
Chiva <i>et al.</i> (2007)	Crossan <i>et al.</i> (1999)	Developed a measurement tool based on the five conceptual dimensions of Organizational Learning Capability (OLC)	Experimentation Risk Taking Interaction with external environment Dialogue						

Appendix: Measuring Organisational Learning and the Learning Organisation

Authors	Based on	Tool and description	Assessment	Moilanen (2001)			Chiva <i>et al.</i> (2007)	
				Archetype	Holistic	Profound	Tested	Aim
			Participative decision making					
Gephart <i>et al.</i> (1996)	American Society for Learning and Development	Conducted research using the learning organization assessment framework created by the research department of the ASTD.	Learning Orientations Individual Group or team Organizational Facilitative Organizational Systems Vision and strategy Leadership and management Culture Structure Change management Systems and processes Communication, information and knowledge systems Performance management Technology					
Jyothibabu <i>et al.</i> (2010)	Marsick and Watkins (2003) combined with a scale of outcomes by Bontis <i>et al.</i> (2002)	Integrated measurement scale for an organisational learning system: Learning enablers Learning results Performance outcomes	7 dimensions of The Dimensions of the Learning Organization Questionnaire					
Mishra and Bhaskar (2010)	Own framework	Measures the degree to which organisations conform to a number of learning organisation structure factors. 13 factors, out of which 2 main factors emerge	Creative problem solving Boundarylessness					

Appendix 2:

Leadership in Learning Organisations

The attached table outlines the work of a number of writers who described the importance of leadership in the organisational learning and learning organisation literature. Their concepts were classified into the following categories: leadership roles, leadership skills, leadership styles and leadership attitudes/mind-sets.

6 pages

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills				Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets		
Popper and Lipshitz (2000)	Create structural foundations Create a culture of trust	Influencing Motivating Evaluating status quo Relating to others	Transformational leadership		Leadership is a crucial factor that affects organizational learning, as leaders can create organizational learning mechanisms and structures and shape a learning culture.	Senior leaders.
Bass (2000)		Inspire Role model Question status quo Coaching	Transformational and transactional leadership Strategic leadership Servant leadership		Transformational leadership relates to the creation and maintenance of the learning organization (p18).	Mainly senior leaders
Chang and Lee (2007)			Transformational and transactional leadership		Both transactional and especially transformational leadership have significant and positive effect on the operation of learning organization.	Senior leaders.
Bass (1997)			Transformational and transactional leadership		These are universal concepts that can be observed in a number of organizations and national cultures.	Mainly senior leaders
Slater and Narver (1995)	Establish a motivating and shared vision. Developing people	Market orientation (learning from customers and competitors) Entrepreneurship Empowerment People development Ability to un-learn	Transformational and facilitative leadership		Market orientation and entrepreneurship need to be present to foster a culture of learning from exploration and experimentation, as well as innovation.	All levels.
Mumford at al.		Problem-solving skills	Skill-based leadership		Effective leadership in learning organizations	Leaders in general

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills				Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets		
(2000)		Social judgement skills Social skills Job-, organization, business and people knowledge	model		depends on the leader's ability to solve complex social problems that arise in the organization.	
Richardson (1995)			Situational leader who can distinguish between deployments of harder, planned approaches, or softer, facilitated approaches to development of the learning organization.			Top leader.
Senge and Kofman (1993)			Servant leadership			All levels.
Hunt (2000)			New transformational and charismatic leadership			Mainly senior leaders
Antonacopoulou (1999)	Create an environmental that not only facilitates learning, but also encourages and rewards it.		Learning manager	Managers need to recognize the need for learning and engage actively in learning as well. Provide feedback, review performance, tolerate mistakes, challenge the status quo	An understanding of managers' attitudes towards learning is crucial for organizations aspiring to become learning organizations.	Managers in general
Ellinger <i>et al.</i> (1999)		Communicate well Encourage others to learn Coach and facilitator of learning Empowerment	Facilitative leadership		Managers as facilitators of learning in a learning organisation.	Leaders and managers.
Mahoney (2000)		Insight into own motivation	Contingent view of leadership: consider the	Leadership at all levels		Senior leadership

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills				Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets		
(!)			prevailing culture, beliefs and organizational factors			
Vera and Crossan (2004) (!)			Contingent view of leadership: transformational and/or transactional leadership		A number of contingency factors influence top management's choice of leadership	CEO and top management
Elkin <i>et al.</i> (2011)			Charismatic and transformational leadership			All leaders. Refers to 'Chinese managers'
McGill <i>et al.</i> (1992)		Systems thinking		Willingness to give up power Tolerance for uncertainty Able to seek feedback on own performance Empathy		Managers in general
Scott-Ladd and Chan (2004)		Emotional intelligence			High levels of EI will result in leaders not only looking for results benefiting themselves, but also the wider organization.	Leaders in general
Brownell (2008)		Effective listening Creating trust				All levels
Goh (1998)	Leaders set the necessary conditions for the organization to develop organizational learning capabilities	Coaching		Shared leadership	Leadership is one of the five building blocks of the learning organization	Senior leadership
Ayupp and Perumal (2008)		Coaching Inspiring and motivating Team building Selection			Transformational change can only be done with the cooperation and involvement of senior leadership.	Importance of top leadership, but also leaders across the organization

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills			Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets	
Bayraktaroglu and Kutanis (2003)		Capacity to learn and challenge the status quo.			All levels. Specifies 'managers' and 'leaders'
Senge 1990	Designers, teachers, stewards	Ability to build shared visions Challenge prevailing mental models Foster more systematic patterns of thinking			Refers initially to leaders on top of the organisation, but stresses that those roles should apply to leaders on all levels.
Yang (2009)					All levels
Tannenbaum (1997)				Tolerating mistakes when individuals are applying new skills during learning periods.	Supervisors
Senge 1999	Articulate guiding ideas Influence through those guiding ideas			Ability to be ignorant and incompetent to foster learning Willingness to collaborate in sharing knowledge	Mainly top leadership.
Senge (1999)				Committed to deep changes in themselves and their organizations	Leaders in general
Senge (1996)	Teachers, stewards and designers				Executives
Nevis <i>et al.</i> (1995)				Create a climate of openness Allow for experimental mind-sets Accept failures Be open to proposed	All levels
				Leadership is a learning system facilitating factor that can either assist or hinder organizational learning.	

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills				Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets		
Mumford (1996)	<p>Role model and how enthusiasm for learning and development</p> <p>Provide learning and development opportunities</p> <p>Integrate learning and development into day-to-day work processes</p> <p>Champion learning</p>			change	Stresses the importance of the managerial role in creating a learning environment.	The managerial role in general
Marquardt (2000)	<p>Systems thinker</p> <p>Change agent</p> <p>Innovator and risk-taker</p> <p>Servant and steward</p> <p>Polychronic coordinator</p> <p>Teacher, mentor, coach and learner</p> <p>Visionary and vision-builder</p>				Roles and capabilities of leaders in the 21 st century	Although he is stressing the importance of distributed leadership, his descriptions are high level and apply mainly to senior leadership
Gephart <i>et al.</i> (1996)	<p>Role models for learning</p> <p>Provide structures and systems that facilitate learning</p> <p>Allow for creativity, innovation and experimentation</p> <p>Ensure that knowledge is shared</p> <p>Provide learning resources</p> <p>Share leadership</p>				Leaders are critical to support learning and development of individuals and teams.	Executive leaders, but stresses the importance of sharing leadership

Appendix: Leadership in Learning Organisations

Writer	Leadership Skills				Impact	Level of leaders
	Roles	Skills	Style	Attitude/Mind-sets		
Erault <i>et al.</i> (1997)	Staff developer, role model and expert, creator of learning climate					All levels, addresses 'managers' overall.
Chinowsky <i>et al.</i> (2007)					Lack of support from senior executives is one of the six primary barriers to the implementation of a learning organisation.	Senior executives.
Chalofsky (2005)					Managing with a traditional manufacturing, assembly-line mentality	Senior executives
Akin Aksu and Ozdemir (2005)					'Behavior of superiors' has strongest correlation with learning	All levels

Appendix 3:

Blank copy of DLOQ used

The attached document is downloaded from Survey Monkey, the platform used to administer the DLOQ, and shows a blank hard-copy version of the survey.

12 pages

Leadership in Learning Organisations

Data Protection and Informed Consent

Dear participant,

Thank you very much for agreeing to take part in this survey, using the 'Dimensions of the Learning Organization Questionnaire', and I greatly appreciate you taking this time to assist me. I am undertaking this project as a part of a Doctorate degree, which I am studying with the University of Leicester. The project I am working on is about the kind of skills leaders at all levels in organizations need to foster individual, group and organizational learning (thus the title 'Leadership in Learning Organizations'). You were selected to take part in this research because of your role as a leader in [REDACTED] and/or because you have recently participated in a 'Lab Hotel' launch, or an 'ideation session' in general.

You can withdraw from this survey at any time if you feel that is necessary. If you are happy to take part in the survey, kindly proceed to the following page. You can still withdraw from the research after continuing, if you wish to do so.

The survey will last for approximately 15 minutes, during which you will be asked a number of questions about individual, team and organizational learning at [REDACTED]. I would like to reassure you that the information which you provide in the course of the survey will be treated in the strictest of confidence. All data collected will be treated in accordance with a strict ethical research code and any applicable Data Privacy laws. In addition, your answers will be unattributed to either yourself or to Hyatt as such.

The data gathered during the survey will only be used for my Doctorate thesis. Your own data will be completely anonymous and you will not be identifiable (i.e. the data will be aggregated, so that no individual data are presented).

Once again, thank you very much for your participation. If you have any questions at any stage of the survey, please do not hesitate to contact me on yves.givel@[REDACTED]

Thank you for your participation!

Yves Givel

Leadership in Learning Organisations

The Dimensions of the Learning Organisation Questionnaire

Developed by Karen E. Watkins and Victoria J. Marsick

"A learning organization is one that learns continuously and transforms itself. Learning is a continuous, strategically used process — integrated with and running parallel to work."

In the last decade, organizations have experienced wave after wave of rapid transformation as global markets and external political and economic changes make it impossible for any business or service—whether private, public, or nonprofit—to cling to past ways of doing work. A learning organization arises from the total change strategies that institutions of all types are using to help navigate these challenges. Learning organizations proactively use learning in an integrated way to support and catalyze growth for individual workers, teams and other groups, entire organizations, and (at times) the institutions and communities with which they are linked.

In this questionnaire, you are asked to think about how your organization supports and uses learning at an individual, team and organizational level. From this data, you and your organization will be able to identify the strengths you can continue to build upon and the areas of greatest strategic leverage for development toward becoming a learning organization.

Please respond to each of the following items. For each item, determine the degree to which this is something that is or is not true of your organization. If the item refers to a practice that rarely or never occurs, score it a one [1]. If it is almost always true of your department or work group, score the item a six [6].

There are no right or wrong answers. We are interested in your perception of where things are at this time.

© 1997 Karen E. Watkins & Victoria J. Marsick. All rights reserved. The authors wish to thank Baiyin Yang, Tom Valentine, and Judy O'Neil for their assistance in validating this questionnaire.

To start the survey, continue to the next page.

Leadership in Learning Organisations

Individual level

1. At [] people openly discuss mistakes in order to learn from them.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. At [] people identify skills they need for future work tasks.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. At [] people help each other learn.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. At [] people can get money and other resources to support their learning.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. At [] people are given time to support learning.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. At [] people view problems in their work as an opportunity to learn.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. At [] people are rewarded for learning.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. At [] people give open and honest feedback to each other.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. At [] people listen to each others' views before speaking.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. At [] people are encouraged to ask "why" regardless of rank.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. At [] whenever people state their view, they also ask what others think.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. At [] people treat each other with respect.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

13. At [redacted] people spend time building trust with each other.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

Team or Group level

14. At [] teams/groups have the freedom to adapt their goals as needed.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. At [] teams/groups treat members as equals, regardless of rank, culture, or other differences.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. At [] teams/groups focus both on the group's task and on how well the group is working.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

17. At [] teams/groups revise their thinking as a result of group discussions or information collected.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. At [] teams/groups are rewarded for their achievements as a team/group.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. At [] teams/groups are confident that the organization will act on their recommendations.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

Organization level

20. [] uses two-way communication on a regular basis, such as suggestion systems, electronic bulleting boards, or town hall/open meetings.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. [] enables people to get needed information at any time quickly and easily.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. [] maintains an up-to-date database of employee skills.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. [] creates systems to measure gaps between current and expected performance.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. [] makes its lessons learned available to all employees.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. [] measures the results of the time and resources spent on training.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26. [] recognizes people for taking initiative.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

27. [] gives people choices in their work assignments.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

28. [] invites people to contribute to the organization's vision.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

29. [] gives people control over the resources they need to accomplish their work.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

30. [] supports employees who take calculated risks.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

31. [] builds alignment of visions across different levels and work groups.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32. [] helps employees balance work and family.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

33. [] encourages people to think from a global perspective.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

34. [] encourages everyone to bring the customers' views into the decision making process.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. [] considers the impact of decisions on employee morale.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

36. [] works together with the outside community to meet mutual needs.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

37. [] encourages people to get answers from across the organization when solving problems.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

38. At [] leaders generally support requests for learning opportunities and training.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

39. At [] leaders share up-to-date information with employees about competitors, industry trends, and organizational directions.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

40. At [] leaders empower others to help carry out the organization's vision.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

41. At [] leaders mentor and coach those they lead.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

42. At [] leaders continually look for opportunities to learn.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

43. At [redacted] leaders ensure that the organization's actions are consistent with its values.

1 Almost Never	2	3	4	5	6 Almost Always
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership in Learning Organisations

Measuring Learning Organization Results at the Organizational Level

In this section, we ask you to reflect on the relative performance of the organization. You will be asked to rate the extent to which each statement is accurate about the organization's current performance when compared to the previous year. There are no right or wrong answers. We are interested in your perception of current performance. For example, if the statement is true for your organization, i.e. "yes", fill in a [5] on the answer sheet. If the statement is not very true of your organization, i.e. "no", fill in a [2] on the answer sheet below.

44. In my organization, return on investment is great than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

45. In my organization, average productivity per employee is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

46. In my organization, time to market for products and services is less than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

47. In my organization, response time for customer complaints is better than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

48. In my organization, market share is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

49. In my organization, the cost per business transaction is less than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

50. In my organization, customer satisfaction is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

51. In my organization, the number of suggestions implemented is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

52. In my organization, the number of new products or services is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

53. In my organization, the percentage of skilled workers compared to the total workforce is greater than last year.

1 Almost Never 2 3 4 5 6 Almost Always

☐☐☐☐☐☐

Leadership in Learning Organisations

54. In my organization, the percentage of total spending devoted to technology and information processing is greater than last year.

1 Almost Never

2

3

4

5

6 Almost Always

☐

☐

☐

☐

☐

☐

55. In my organization, the number of individuals learning new skills is greater than last year.

1 Almost Never

2

3

4

5

6 Almost Always

☐

☐

☐

☐

☐

☐

Leadership in Learning Organisations

Additional Information About You

The information collected in this section is for contextual purposes only.

56. Which of the following categories best describes your employment with the organisation?

- ☐ Middle Management in a Hotel (Assistant Manager, Manager, Dept Head)
- ☐ Senior management in a Hotel (GM, Managing Committee, Asst. Managing Committee)
- ☐ Manager or Director in a Corporate or Divisional Office
- ☐ Vice President or higher in a Corporate or Divisional Office

57. Are you based in a Lab Hotel?

- ☐ Yes
- ☐ No

58. If 'Yes', did you attend any of the 'Innovation and Ideation Sessions'?

- ☐ Yes
- ☐ No

59. If 'No', have you attended any of the 'Innovation and Ideation Sessions' in one of the hotels or offices?

- ☐ Yes
- ☐ No

60. How many hours per month do you spend on your own time on work-related learning?

- ☐ 0 hours per month
- ☐ 1-10 hours per month
- ☐ 11-20 hours per month
- ☐ 21-35 hours per month
- ☐ 36+ hours per month

61. Having completed the above 'Dimensions of the Learning Organization Questionnaire', how relevant or valuable do you feel are those questions to the hospitality industry in general?

1 Not very relevant/valuable	2	3	4	5	6 Very relevant/valuable
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

62. How relevant or valuable are they to [REDACTED]

1 Not very relevant/valuable	2	3	4	5	6 Very relevant/valuable
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Thank You !

Many thanks for participating in this survey. If you are interested in hearing more about my research, or about the concept of the 'learning organization' overall, please feel free to contact me on: yves.givel@[REDACTED]

Thank You again !

Yves Givel

Appendix 4:

Invitation Letters

The first letter is the template that was used to invite individual interview participants at the case study organisation's corporate office. The second letter was used to invite the hotel-based participants.

2 pages

Preparation for Interview – Office based interviews

Introduction

The purpose of the discussion is to get information from you about skills of successful leaders in a learning organization. A learning organization is the term given to a company that facilitates the learning of all its employees and continuously transforms itself. Learning organizations develop as a result of the pressures facing modern organizations, such as increased competition and the effects of globalization, and enable them to remain competitive in the business environment.

You have been selected for this interview due to your knowledge of Project X, and implementation of the 'innovation by design' cycle and its application in practice ... all processes that are very much in line with the above idea of what a Learning Organization is.

The Interview

The interview is a semi-structured interview, which will last for about 1 hour maximum – using an approach called the 'Critical Incident Technique'. According to John Flanagan, the attributed originator of this process, the Critical Incident Technique is a procedure for collecting direct observations of human behavior in such a way as to facilitate their potential usefulness in either solving a practical problem or developing broad theories.

The term 'critical incident' refers to a 'clearly demarcated scene or situation' – and the goal is to elicit aspects of best and worst practices or behaviors during this 'incident'.

- Over the past weeks, and as part of Project X, you have been exposed to the 'innovation by design' process or cycle, which has the aim to improve processes or products in a hotel, an office, or in the organization overall.
- I would like you to think about and recall situations (critical incidents) when you really felt that leadership made a difference (i.e. what went well, and what didn't). Think about situations where you had an opportunity to observe the behavior of various leaders – middle managers, senior managers, or eventual corporate leaders – in the context of the above innovation process, Project X, and the 'innovation by design' process.
- Observations can be about yourself (how you felt and behaved in such situations), peers or superiors (where you have observed either very effective or ineffective behaviors of leaders in such an 'incident' or situation), and particular as well the General Managers and Managing Committee members in the Lab hotels.
- The situation could be at any stage of Project X, or the innovation cycle ... focus, empathy, ideation, proto-typing, implementation, etc.

During the interview, I will be asking you to recall and 'relive' those incidents, and describe them to me in great detail. I will be asking you about the context where the incidents occurred, who was involved, what happened, the way leaders behaved and what skills they used, how successful they were, and the general outcome of the 'incident' or situation. Depending on how rich your descriptions are, we may have time to discuss several of these 'critical incidents' ... or at least 2 to 3 (or more!). Don't be afraid to tell a story – that's what this is all about!

I have also attached an 'Informed Consent Form' for your information – I will bring a hard-copy to the interview for you to sign (if you agree ...).

Many thanks again for assisting me in this study – your help is much appreciated! For any additional question, please call me on (312) 218 9047 or send me a mail.

Yves

Preparation for Interview – Hotel based interviews

Introduction

The purpose of the discussion is to get information from you about skills of successful leaders in a learning organization. A learning organization is the term given to a company that facilitates the learning of all its employees and continuously transforms itself. Learning organizations develop as a result of the pressures facing modern organizations, such as increased competition and the effects of globalization, and enable them to remain competitive in the business environment.

We have selected your hotel, being one of our Lab Hotels, as a research location – as the implementation of Project X, the ‘innovation by design’ cycle and its application in practice are very much in line with the above idea of what a Learning Organization is.

The Interview

The interview is a semi-structured interview, which will last for about 1 hour maximum – using an approach called the ‘Critical Incident Technique’. According to John Flanagan, the attributed originator of this process, the Critical Incident Technique is a procedure for collecting direct observations of human behavior in such a way as to facilitate their potential usefulness in either solving a practical problem or developing broad theories.

The term ‘critical incident’ refers to a ‘clearly demarcated scene or situation’ – and the goal is to elicit aspects of best and worst practices or behaviors during this ‘incident’.

- Over the past weeks, and as part of Project X, you have been using the ‘innovation by design’ process or cycle, in order to improve processes or products in your hotel.
- I would like you to think about and recall situations (critical incidents) when you really felt that leadership made a difference (i.e. what went well, and what didn’t). Think about situations where you had an opportunity to observe the behavior of various leaders – middle managers, senior managers, or eventual corporate leaders – in the context of the above innovation process.
- Observations can be about yourself (how you felt and behaved in such situations), subordinates (how your reports have dealt with those situations), peers or superiors (where you have observed either very effective or ineffective behaviors of leaders in such an ‘incident’ or situation).
- The situation could be at any stage of the innovation cycle ... focus, empathy, ideation, proto-typing, implementation, etc.

During the interview, I will be asking you to recall and ‘relive’ those incidents, and describe them to me in great detail. I will be asking you about the context where the incidents occurred, who was involved, what happened, the way leaders behaved and what skills they used, how successful they were, and the general outcome of the ‘incident’ or situation. Depending on how rich your descriptions are, we may have time to discuss several of these ‘critical incidents’ ... or at least 2 to 3 (or more!). Don’t be afraid to tell a story – that’s what this is all about!

I have also attached an ‘Informed Consent Form’ for your information – I will bring a hard-copy to the interview for you to sign (if you agree ...).

Many thanks again for assisting me in this study – your help is much appreciated! For any additional question, please call me on (312) 218 9047 or send me a mail.

Yves

Appendix 5:

Interview Guides (Focus Group and Individual)

The attached document shows the two interview guides that were established by the researcher: one for the individual interviews, and one for the focus group interviews. Both guides are based on a semi-structured interview process, using the critical incident technique to elicit good or bad leadership behaviours.

8 pages

[case study organisation]1. Focus Group Interview Guide

Preparation	<ul style="list-style-type: none"> • Recording device with good batteries. Take spare batteries with. • Microphone. • Name cards – write first names on it. • Round table for Moderator and Co-Moderator, and 6-8 participants • Each participant should receive an Informed Consent form to sign at the beginning of the session.
Welcome by moderator	<ul style="list-style-type: none"> • Thank participants for coming • Moderator introduction, and eventual Co-Moderator introduction • Moderator asks group to introduce themselves: <ul style="list-style-type: none"> ○ First name only ○ How long they have worked at the hotel, and for [case study organisation] ○ Level in the organisation, overall scope of work • Moderator to introduce research <ul style="list-style-type: none"> ○ <i>The purpose of today's discussion is to get information from you about skills of successful leadership in a learning organisation. A learning organization is the term given to a company that facilitates the learning of all its employees and continuously transforms itself. Learning organizations develop as a result of the pressures facing modern organizations, such as increased competition and the effects of globalisation, and enable them to remain competitive in the business environment.</i> ○ <i>We have selected your hotel, being one of our Lab Hotels, as a research location – as the implementation of the ‘innovation by design’ cycle and its application is very much in line with the above idea of what a Learning Organization is.</i> ○ <i>The study I am conducting is a pure academic research, and not a work project. This means that although Hyatt allowed me to use the Lab Hotels as a research case, the results of the study will belong to the University of Leicester, and will be used solely towards my doctorate degree.</i> • Housekeeping notes <ul style="list-style-type: none"> ○ Voice recording of session ○ Only one person should speak at the time ○ Moderator's role: guide the conversation only, avoid giving opinions ○ Group should feel free to generate some discussion, and build on each other's stories and comments ○ The session is open, and everybody's view is important ○ Data will be treated confidentially and anonymously <ul style="list-style-type: none"> ▪ <i>We have name cards on front of us, but all I need to know if your first names. In addition, no names will be included in any report.</i> ○ The session will take about 1 hour ○ Please no mobile phones • Informed consent

Interview Guides – ‘Leadership in Learning Organisations’ – Yves Givel, July 2012

	<ul style="list-style-type: none"> ○ Give informed consent forms to sign
Setting the scene	<ul style="list-style-type: none"> ● <i>Over the past weeks, you have been taught how to use the ‘innovation by design’ process or cycle, in order to improve processes or products in your hotel.</i> <ul style="list-style-type: none"> ○ <i>Can somebody tell me a little more about how this process is used?</i> ○ <i>What have been the biggest success stories?</i> ○ <i>What are the biggest difficulties?</i> ○ <i>Other than the improved processes and/or processes, what other positive influence had this new approach?</i>
Leadership skills	<ul style="list-style-type: none"> ● <i>In the pre-focus group instructions, I had asked you all to think about two situations where you used the above approach. The situation could be at any stage of the cycle ... focus, empathy, ideation, proto-typing, implementation, etc.</i> <ul style="list-style-type: none"> ○ <i>Tell me about one of the situation that you lead, and that was very successful.</i> <ul style="list-style-type: none"> ▪ <i>Did you do anything that was especially effective as a leader?</i> ○ <i>Tell me about one of the situation that you lead, and that was not at all successful.</i> <ul style="list-style-type: none"> ▪ <i>Did you do anything that was especially ineffective as a leader?</i>
Context	<ul style="list-style-type: none"> ● <i>Do you consider your hotel different than any of the other Lab Hotels?</i> <ul style="list-style-type: none"> ○ <i>What are the differences?</i> ○ <i>How do those differences influence the success of the ‘innovation by design’ process?</i> ○ <i>Has your hotel taken any specific steps to overcome some of the eventual difficulties to innovation and learning?</i> ○ <i>How did you as leader overcome those difficulties?</i>
Industry	<ul style="list-style-type: none"> ● <i>Is our industry ready for such an approach to innovation, based on employee participation, empowerment and knowledge sharing?</i> ● <i>If you were to implement the same ‘innovation cycle’ in a different industry, for example in a bank or a factory – would you need a different skill set?</i>
Leadership Commitment	<ul style="list-style-type: none"> ● <i>How would you describe commitment from senior leadership in your hotel and [case study organisation] overall?</i> <ul style="list-style-type: none"> ○ <i>If low, how does this impact the Lab hotel?</i> ○ <i>If high, how does this impact the Lab hotel?</i>
Debrief	<ul style="list-style-type: none"> ● Give opportunity to ask questions, and eventually clarify some of the information outlined at the beginning of the focus group session.
Ending the session	<ul style="list-style-type: none"> ● Thank participants ● Explain what will happen with data ● Ask if ‘any questions?’

2. Individual Interview Guide

Preparation	<ul style="list-style-type: none"> • Recording device with good batteries. Take spare batteries with. • Microphone. • Have Informed Consent form ready to sign at the beginning of the session.
Welcome by moderator	<ul style="list-style-type: none"> • Thank the participant for agreeing to attend this interview. • Introduction of Interviewer (researcher) • Interviewer asks interviewee to introduce him or herself: <ul style="list-style-type: none"> ○ Full name ○ How long they have worked at the hotel or office, and for [case study organisation] ○ Level in the organisation, overall scope of work • Moderator to introduce research <ul style="list-style-type: none"> ○ <i>The purpose of today's discussion is to get information from you about skills of successful leadership in a learning organisation. A learning organization is the term given to a company that facilitates the learning of all its employees and continuously transforms itself. Learning organizations develop as a result of the pressures facing modern organizations, such as increased competition and the effects of globalisation, and enable them to remain competitive in the business environment.</i> ○ <i>We have selected your hotel, being one of our Lab Hotels, as a research location – as the implementation of the ‘innovation by design’ cycle and its application is very much in line with the above idea of what a Learning Organization is.</i> ○ <i>The study I am conducting is a pure academic research, and not a work project. This means that although [case study organisation] allowed me to use the Lab Hotels as a research case, the results of the study will belong to the University of Leicester, and will be used solely towards my doctorate degree.</i> • Housekeeping notes <ul style="list-style-type: none"> ○ Voice recording of session ○ Interviewer's role: guide the conversation only, avoid giving opinions ○ Give as much detail – don't be afraid of telling a story (or stories) ○ Data will be treated confidentially and anonymously <ul style="list-style-type: none"> ▪ <i>This is a confidential interview, and no names will be included in any report.</i> ○ Please no mobile phones • Informed consent <ul style="list-style-type: none"> ○ Give informed consent forms to sign
Critical Incident Technique	<ul style="list-style-type: none"> • Session <ul style="list-style-type: none"> ○ <i>The interview is a semi-structured interview, which will last for about 1 hour maximum – using an approach called the ‘Critical Incident Technique’.</i> • Critical Incident Technique <ul style="list-style-type: none"> ○ <i>According to John Flanagan, the attributed originator of this process, the Critical Incident Technique is a procedure for collecting direct</i>

Interview Guides – ‘Leadership in Learning Organisations’ – Yves Givel, July 2012

	<p>observations of human behaviour in such a way as to facilitate their potential usefulness in either solving a practical problem or developing broad theories.</p> <ul style="list-style-type: none"> ○ The term ‘critical incident’ refers to a clearly demarcated scene or situation – and the goal is to elicit aspects of best and worst practices during this ‘incident’. ● Incidents and situations <ul style="list-style-type: none"> ○ I had asked you to think about a number of ‘incidents’ or situations where you had an opportunity to observe the behaviour of various leaders – middle managers, senior managers, and eventual corporate leaders. ○ I would like you to just spend a little moment recalling those incidents. I will be asking you about the context where the incident occurred, who was involved, the way leaders behaved and what skills they used, and the outcome. 		
Area	Main Questions	Additional questions	Clarifying questions
Setting the scene	<ul style="list-style-type: none"> ● Over the past weeks, you have been using the ‘innovation by design’ process or cycle, in order to improve processes or products in your hotel. ● Other than the improved processes and/or processes, what other positive influence had this new approach? 	<ul style="list-style-type: none"> ● How has this process been used in your hotel? ● What have been the biggest success stories? ● What are the biggest difficulties? ● On your culture? ● On leaders in the hotel? 	<ul style="list-style-type: none"> ● Can you expand a little on this? ● Can you tell me anything else? ● Can you give me some examples?
Leadership skills INCIDENT 1	<ul style="list-style-type: none"> ● In the pre-interview instructions, I had asked you all to think about a number of ‘incidents’ or situations where you used the above approach. ● The situation could be at any stage of the cycle ... focus, empathy, ideation, proto-typing, implementation, etc. 	<p>Context - in which the incident occurred</p> <ul style="list-style-type: none"> ● What led up to the incident (background)? What was the situation? ● Why was this situation different? <p>Behaviour – exactly what the individual did that was effective or ineffective</p> <ul style="list-style-type: none"> ● Did you (or the respective leader) have to use a different set of skills to address this situation? ● Did you (or the respective leader) do anything that was especially effective or ineffective as a leader? ● Why was this action effective or ineffective? <p>Consequences – of the behaviour and whether or not consequences were in the participant’s control</p> <ul style="list-style-type: none"> ● What was the outcome or result of this action? ● What would you do if you are faced with a similar situation in the future? ● What could have made the action more effective? 	<ul style="list-style-type: none"> ● Can you expand a little on this? ● Can you tell me anything else? ● Can you give me some examples?

Interview Guides – ‘Leadership in Learning Organisations’ – Yves Givel, July 2012

Area	Main Questions	Additional questions	Clarifying questions
Leadership skills INCIDENT 2	<ul style="list-style-type: none"> Can you think of another such ‘incident’ or situation, where a leader’s skills or behaviours made a difference? To the better or to the worse? The situation could be at any stage of the cycle ... focus, empathy, ideation, proto-typing, implementation, etc. 	<p>Context - in which the incident occurred</p> <ul style="list-style-type: none"> What led up to the incident (background)? What was the situation? Why was this situation different? <p>Behaviour – exactly what the individual did that was effective or ineffective</p> <ul style="list-style-type: none"> Did you (or the respective leader) have to use a different set of skills to address this situation? Did you (or the respective leader) do anything that was especially effective or ineffective as a leader? Why was this action effective or ineffective? <p>Consequences – of the behaviour and whether or not consequences were in the participant’s control</p> <ul style="list-style-type: none"> What was the outcome or result of this action? What would you do if you are faced with a similar situation in the future? What could have made the action more effective? 	<ul style="list-style-type: none"> Can you expand a little on this? Can you tell me anything else? Can you give me some examples?
Context	<ul style="list-style-type: none"> Do you consider your hotel different than any of the other Lab Hotels? In the US or overseas? 	<ul style="list-style-type: none"> What are the differences? How do those differences influence the success of the ‘innovation by design’ process? Has your hotel taken any specific steps to overcome some of the eventual difficulties to innovation and learning? How did you as leader overcome those difficulties? 	<ul style="list-style-type: none"> Can you expand a little on this? Can you tell me anything else? Can you give me some examples?
Industry	<ul style="list-style-type: none"> Is our industry ready for such an approach to innovation, based on employee participation, empowerment and knowledge sharing? If you were to implement the same ‘innovation cycle’ in a different industry, for example in a bank or a factory – would you need a different skill set? 	<ul style="list-style-type: none"> Have you seen this implemented somewhere else? When discussing this with colleagues outside of your hotel, what is their reaction? Are the leadership skills necessary to manage this process in a hotel different? 	<ul style="list-style-type: none"> Can you expand a little on this? Can you tell me anything else? Can you give me some examples?

Interview Guides – ‘Leadership in Learning Organisations’ – Yves Givel, July 2012

Area	Main Questions	Additional questions	Clarifying questions
Leadership Commitment	<ul style="list-style-type: none"> How would you describe commitment from senior leadership in [case study organisation] overall? 	<ul style="list-style-type: none"> If low, how does this impact the Lab hotel? If high, how does this impact the Lab hotel? 	<ul style="list-style-type: none"> Can you expand a little on this? Can you tell me anything else? Can you give me some examples?
Debrief	<ul style="list-style-type: none"> Give opportunity to ask questions, and eventually clarify some of the information outlined at the beginning of the focus group session. 		
Ending the session	<ul style="list-style-type: none"> Thank participants Explain what will happen with data Ask if ‘any questions?’ 		

3. General Interview Questions (for Focus Group and Individual)

Critical Incident Technique

Context - in which the incident occurred	<p>Please think about and then describe a situation when you had to review an existing process in your operation using the above (rather new) framework, based on the various steps of focusing, empathising, ideating, prototyping, etc..</p> <ul style="list-style-type: none"> • What led up to the incident (background)? What was the situation? • Why was this situation different?
Behaviour – exactly what the individual did that was effective or ineffective	<ul style="list-style-type: none"> • Did you have to use a different set of skills to address this situation? • Did you do anything that was especially effective or ineffective as a leader? • Why was this action effective or ineffective?
Consequences – of the behaviour and whether or not consequences were in the participant’s control	<ul style="list-style-type: none"> • What was the outcome or result of this action? • What would you do if you are faced with a similar situation in the future?

Interview Guides – ‘Leadership in Learning Organisations’ – Yves Givel, July 2012

Interview Questions based on Research questions

Research Questions		Interview Questions	
Barriers			
1	What barriers and challenges have leaders faced in the process of moving towards becoming a learning organisation (e.g. politics, resistance to change, organisational culture, other leadership, lack of commitment, funds, etc.)?	<ul style="list-style-type: none"> • What were the main barriers or restrictions for you to implement the ‘innovation cycle’? • Were these barriers or restrictions specific to your hotel, or are they generic? • Are they ‘man-made’? • Are they within your scope to address? • Do you feel that as a result of the implementation of this process, learning has taken place for individuals, teams and the hotel overall? Why? 	
5	How successful have leaders in the case study organisations been to overcome some of the barriers and critiques raised about the concept of the learning organisation?	<ul style="list-style-type: none"> • How did you overcome some of the above mentioned barriers? • Do you believe that the ‘innovation cycle’ is a suitable process for your hotel, or for your industry? 	
7	What practical steps has the case study organisation taken to overcome barriers and critiques of the learning organisation?	<ul style="list-style-type: none"> • Has your hotel evaluated those barriers and restrictions, and looked at ways to overcome them? • If yes, what was done and what was the outcome? • If no, what could the hotel do to overcome those barriers and restrictions? 	
Impact of Leaders			
2	What leadership skills are conducive to the creation of the conditions and structures characteristic of a learning organisation? Are those leadership skills influenced by the wider organisational context (e.g. culture, power relations and organisational structures) or environmental factors (e.g. economy, competition)?	<ul style="list-style-type: none"> • What made you successful? • To what degree did you have to use different skills to implement the ‘innovation cycle’ due to some of the above mentioned barriers and restrictions? 	
4	Are those leadership skills important for leaders at all levels of the organisation? Or are different skills required by leaders on different levels?	<ul style="list-style-type: none"> • How did your superior’s skills assist or hinder the process? 	
3	How real is leadership commitment in the case study organisation? Is it mainly rhetorical or have there been genuine attempts at more fundamental cultural and structural changes?	<ul style="list-style-type: none"> • Describe the role of your General Manager in driving this Lab Hotel initiative. 	
Hospitality Industry			
6	Is the learning organisation a concept that can be applied to the hospitality industry? How useful is it, and would the concept be according to ‘text book’?	<ul style="list-style-type: none"> • Is our industry ready for such an approach to innovation, based on employee participation, empowerment and knowledge sharing? 	
8	Are the leadership skills that are conducive to the development of a learning organisation different in the hospitality industry then they would be anywhere else?	<ul style="list-style-type: none"> • If you were to implement the same ‘innovation cycle’ in a different industry, for example in a bank or a factory – would you need a different skill set? 	
Leaders in the organization			
10	How successful has the case study organisation been in recruiting and developing leaders in alignment with the strategy of becoming a learning organisation?	<ul style="list-style-type: none"> • How do you rate the overall quality of leadership in your hotel, measured against their ability to foster innovation and learning? • Do you believe that the skills of your successful leaders can be developed in existing employees, or do you have to hire for them? 	

Appendix 6:

Coding Summary by Node Extract (Excel)

The attached summary represents the front sheet of a larger EXCEL document, which contains all the nodes as exported from NVivo. The sheet outlines all the level 1-4 coding categories, number of sources where the comments came from, and number of references. Information on importance, re-coding and labels were added by the researcher following the analysis of the data. The detailed process followed is listed on page 4 of this summary.

17 pages

Coding Summary By Node Extract

Code level 1	Code level 2	Code level 3	Code level 4	Sources	References	Importance	Re-code	Label
Barriers				10	130			
Barriers and challenges				10	88			
		Budget		2	7	2		
		Communication		3	3			
		Corporate initiative		5	7	1		
		Culture		5	10	1		Exporting the lab hotel concept to other cultures
		Customers		1	1			
		Internal interests		2	5	2		Power struggles
		Involvement		1	2			
		Leadership		4	13	1		Leaders constraining the success of a lab hotel, not allowing experimentation.
		Learning support		2	5			
		More work		1	2			
		No change		6	7	1		Not changing the way one works
		Overload		1	1			
		Planning		2	2			
		Results		2	3			
		Scepticism		1	5			
		Tenure		4	6	1		
Corporate				2	2			
Leaders overcoming barriers				3	7			
		Commitment		1	2			
Organisation overcoming barriers				10	33			
		Communication		1	2			
		Culture		3	3			
		Incentives		2	3			
		Onboarding		1	1			
		Selection process		7	13	1		Creating a new selection process and employee profile, in order to attract the right people to a Learning Organisation.
		Wider involvement		1	2			
Case Study Organisation				13	69			
Commitment				10	19	1		How real is the leadership comitment in the case study organisation? Rhetorical or a genuine attempt at more fundamental cultural and structural changes?
Culture				4	9	1		Shift of culture towards innovation
Lab hotels				2	2			
Leaders in the organisation				5	10	1		How successful has the case study organisation been in recruiting and developing leaders in alignment with the strategz of becoming a learning organisation?
Learning organisation				6	19	1		Why the case study organisation is a LO
Negatives				2	7	2		Actions not in line with the LO concept
New approaches				1	2			
Performance				1	1			
Structure				2	3			

Coding Summary By Node Extract

Code level 1	Code level 2	Code level 3	Code level 4	Sources	References	Importance	Re-code	Label
Design process				9	22			
	Document analysis			2	6			Comments about the process implemented by the d-school 'Innovation by design'.
	Interviews			0	0			
Hospitality Industry				7	7			
	Leadership skills			2	2			
	Learning organisation concept			1	1			
	Other industries			1	1			
Impact of Leaders				15	363			
	Influence of wider organisational or environmental fac			9	37			
	Culture			1	1			
	Day to day job			2	5	2		
	Internal interest groups			3	4	2		Different professions and functional departments. All need to get involved.
	Organisation strategy			2	2			
	Organisational values			1	1			
	Personal characteristics			1	3			
	Structure			1	1			
	Team			2	3			
	Tenure			5	9	1		Working in an environment where employees have long tenure and years of service.
	Unions			4	8	1		Leaders have to be able to deal with unions in some properties, but maybe not in others.
Leadership at all levels				10	46			
	Middle Managers			3	16	1		Different skills on different levels, and the importance of those skills on different levels.
	Customer focus			1	1			
	Process			1	9			Middle managers are more focused on the actual process of innovation than innovation itself.
	Senior leadership			1	1			

Coding Summary By Node Extract

Code level 1	Code level 2	Code level 3	Code level 4	Sources	References	Importance	Re-code	Label
				15	278			
		Adaptability		6	10	1	re-coded	Adapt or change your own style, adapt to a new situation or environment.
		Broad perspectives		1	1			
		Change management		6	11	1		Skills around embracing change
		Coaching		4	12	2		Giving individuals support to achieve their learning goals and improve performance.
		Collaboration		4	9	2	re-coded	The skill of reaching out and collaborate across functions and geographies, and building consensus.
		Communication		5	7			
		Customer focused		1	1			
		Emotional intelligence		1	2			
		Empathy		11	33	1	re-coded	Able to ask the right questions, gain insight, and put oneself into the other-s shoes.
		Empowerment		7	13	1	re-coded	Delegate decision making.
		Experimentation		8	17	1	re-coded	Let people try out new things
		Experimentatio Failure		7	20	1	re-coded	Not afraid of failing, committing to prototyping
		Humility		3	8			
		Influencing		3	6			
		Innovative		1	1		re-coded	
		Learning agility		9	22	1	re-coded	Willing and able to learn
		Listening		7	16	1		Be a good listener, and listen before acting.
		Loyalty		1	1		re-coded	
		Multi-tasking		1	3			
		Openness		7	11	1	re-coded	Open to new ideas, being open-minded.
		Organisation savvy		1	2			
		Participation and involvement		6	8	1		Foster employee involvement and participation.
		Passion		4	5			
		Pragmatism		1	1		re-coded	
		Problem Solving		1	1		re-coded	
		Process		4	5			
		Respect		1	1			
		Role Model		4	6			
		Strategic		1	1			
		Technology savvy		3	3			
		Transparency		1	1		re-coded	
		Trust		5	10	2		Be the 'go to' person that people trust and follow.
		Visionary		1	1			

Coding Summary By Node Extract

Code level 1	Code level 2	Code level 3	Code level 4	Sources	References	Importance	Re-code	Label
		Negative impact skills		7	36			Those leadership skills that are not supporting organisational learning
		Control		5	12	1	re-coded	
		Collaboration		1	1		re-coded	
		Experimentation		1	2		re-coded	
		Emotional resilience		1	2		re-coded	
		Know everything		5	10	1	re-coded	
		Lack of empathy		1	1			
		Lack of action		1	1		re-coded	
		Lack of learning		1	1			
		Listening		2	2		re-coded	
		Power		1	1			
		Problem solving		1	1			
		Technical		1	1			

Process:

1. Nodes summary downloaded from Nvivo
2. Create sheet for each group based on Codes
3. Eliminate duplicate nodes that were created (e.g. where coded in a lower and higher code level)
4. Re-code where necessary (i.e. where no 3rd level code was available, or wrong coding)
5. Evaluate individual importance of nodes based on number of references and sources: 1 and 2
Green coloured box = enough different sources, Red coloured box = limited different sources
6. Review quotes and select key quotes for each 'important' node
7. Review additional quotes not coded into specific nodes, to supplement above.
8. Add narrative to each selected quote.

25

8

33

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/10/2012 6:40:34 AM	It's not the biggest, strongest, or the most beautiful bird that survives, it's the one that can adapt. I find the word innovation is the wrong term because it creates a certain expectation. It makes everybody think that we're gonna come up with an Apple iPhone or something like that, which we're not. I don't think we will, but we need to evolve. The one thing is everything is customer-based. In order to evolve you truly need to be employee centric because in the end they make it happen on a day to day basis.	One of the corporate VPs describes the importance of being adaptable in today's world, and that a big part of innovation is the ability to adapt.
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:01:16 PM	Amanda Koehler\Flexibility. Yves Givel\Flexibility. Why flexibility? Amanda Koehler\Because things are changing. I think the way that we're doing things now is changing, like you said innovation. I think people need to be flexible and want to learn how to learn different ways and to lead people into different ways.	
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 11:01:25 AM	Danielle:I mean, I can tell you from when I came to interview for this position I was shocked that people don't wear ties. I'm like, "O'Hare? This is where, like, every corporate individual comes here once a week and you're interviewing me right now without a tie on?" I was shocked by it. I didn't ask any questions, I was just like, "Maybe he had to run out for a meeting and forgot this." I was, like, so confused. I was just, like, shocked because I made sure I was in my best suit with my perfect dirt sized earrings or whatever all those standards are supposed to be. But then as my whole day of interviews went on, I realized, "Oh this is something that they kind of brought out within Project X." Not only is Project X for our customer but it's for our employees as well, and that side of things I wasn't aware of. I knew I was going to apply for this position that was rolling out Project X and that's all everybody could really talk about, but I didn't know what that had to do with the employees as well what their feedback was and what's more comfortable for them at work, and life-work balance and everything that kind of comes along with it.	
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:23:40 PM	Dave changed with the times. Dave was a dinosaur. I worked for him 15 years ago and he was raised the way Carlos is describing. I sure as hell would not leave before he did and all those sort of things back then. He evolved. Some do. Some don't. He's the one who finally came to me and said why are you here on Saturday.	An example from one of the focus groups, with a senior hotel leader describing how his General Manager, a successful lab hotel leader, evolved and adapted to his new role.
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 6 - Joseph Khairallah - Sep 11 2012	11/20/2012 7:15:58 AM	I like what I saw with Michael Gray at the Churchill. The way as an old Hotelier, and old not like "old", but old as in many many years under his belt who is a true Hotelier, very professional. To me kind of buttoned up, right to see him embrace this and the joy out of it was amazing. To me he's the hero of the lab hotels.	Another example of a GM that embraced this change and adapted.
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:25:59 PM	I mean that's an extreme, but it's the same. There are just cultural differences. It's everything. It's like I can call my daughter a hundred times and her phone and she will not answer. If I send her a text she will respond to me instantaneously. Even with our managers sometimes. That's how I communicate with my managers. I will text them because I know I'll get an immediate response. If I leave a voice mail it could be days.	Things around us are constantly changing, and we have to adapt to stay on top of it and be successful.
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:23:08 PM	I think he can adjust to it. I think the demands of what the guests are asking for might require him to spend more time there. It's so involved and so consuming because they're on their own dime. Typically they're paying for the resort out of their own pocket. So demands are much different. It's not going on their card. You do get the group business, but there's such a demand during the summer from the transient guests that it is just a very tough environment. I think he would do well. The associates would appreciate his genuine caringness for them. At least at my last property it would really go a long way. It all depends on the GM. The GM has to buy into it. The old timers that are stuck in 20 years ago are in my opinion dinosaurs that are really detrimental to the company and the culture.	
Impact of Leaders	Leadership skills	Adaptability	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:25:22 PM	I think the dinosaur also can, going back to this generational thing, doesn't get the fact that you have to motivate differently in today's world. You're not going to get the same result. You can beat me up or beat him up back when we were young. I don't know that you can do that.	
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 4 - Pedro Itzarray - July 20 2012	10/24/2012 7:27:13 AM	One of the projects he was a woman's preference you know for our women travelers that come in to our hotel. He was able to involve housekeepers, coordinators other managers, engineering in different teams to be able to achieve the results. I think he his engagement scores went up. He has done a fantastic job. He's not only a talented manager in his own right but he has been able to make the change, make the adjustment to the new style that is required for this kind of initiative to work.	An example stated by the HR Director of a lab hotel, describing how the ability to adapt made one of their lab leaders very successful in his new role.
Impact of Leaders	Leadership skills	Adaptability	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/20/2012 7:15:52 AM	The other one is the GM in Sao Paulo, I think Thierry stepped up big time because he's an old finance guy that things are either black or white in this world and he opened his mind drastically.	Another example of a GM that embraced this change and adapted.
Impact of Leaders	Leadership skills	Broad perspectives	Experiences in different areas and environments	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:35:21 AM	I also think we would do well, particularly under the guise of this project, of looking outside of our industry more to say if we truly value the combination of skills and experiences, backgrounds and perspectives that we say we do, then we should probably be a little more expansive in our view coming outside of - could be just coming out of hotels, maybe still within hospitality broadly, but at least outside of hotels, otherwise, we're just kind of bringing more sea of sameness into our organization.	
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:50:53 PM	And no matter how hard I say, "Here's why this is important," and I try to link it to the mission of the organization, they still have to embrace that message, right? I can only communicate that to them, and they still have to want to do that. And so I think that's an innate - it's a bit of, their personality, right?	
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:34:14 AM	but placing more of an emphasis on how you lead and manage ambiguity I think is a bigger deal.	Managing uncertainty and ambiguity is become more and more important in these times of accelerated change.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:12:17 PM	It doesn't give you an opportunity to get frustrated because you're constantly looking at it in a different way. You can see that I have to improve these scores. How can I improve these scores? Gosh, I've tried everything." Wait a minute. You really haven't tried everything. You may think you've tried everything because you're the one who keeps coming up with the solutions that you think are the solutions.	A leader has to be a role model of embracing change. Just keep doing the same thing every day will not give different results.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 4 - Pedro Itzarray - July 20 2012	10/14/2012 8:53:31 PM	Pedro:Yeah. When it comes to the innovation process, two things come to mind. We had a particular project that was about placing bean bags and really cheap furniture in my lobby. And, same as you I guess, I also came from the operations. I walk in the lobby and I see \$10 bean bags in my beautiful lobby and I see cheap Ikea furniture. And I was resistant to it. I had not been part of the initial group that was selected to receive the training to be a lab leader so I wasn't sold on the idea to be honest. I walk into my lobby and I saw something that was out of place, something that looked cheap, something that was not necessarily something that I thought was up to par with the hotel and with our guests and what my experience tells me should be in a lobby. But, the general manager at the time was Peter Rice and he had set up this core group of people that were going to part of the lab hotel. The hard part was that he left and we get a brand new leader in Dania. So Dania has the challenging task of coming in, brand new GM, brand new process in a brand new hotel. So the challenges for her of course were greater than anybody else and she's faced with people like me that were really resisting the change. I wasn't really actively resisting but I was at least skeptical of it. I'm thinking, "I don't know who came up with this. This is wrong. These people have never worked in a hotel. What the heck is going on?" But I think what really made a difference was that she was able to come in and not only convince me but also she was very, very smart about selling the idea to the staff and to the hourly staff and to get them engaged and to get them involved.	An example of how a leader successfully managed change in one of the lab hotels, when one of the leadership committee members did not understand what the change was all about.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:46:57 AM	People's interactions in any type of situation. Their ability to approach change or accept change or whether it's change or a leadership quality or a project that they need to work on. How does this person go about doing it? When they make those mistakes, which we all do, how do they react to them and how do they respond to regroup and like, "Ooop, that wasn't the right thing to do," and then going back and learning from it. That's what this Lab process is about too.	
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:45:13 PM	So I think that people's ability to embrace change was probably the biggest - they weren't embracing change when I first rolled out the tools and come. How can I improve these scores? Gosh, I've tried everything." Wait a minute. You really haven't tried everything. You may think you've tried everything because you're the one who keeps coming up with the solutions that you think are the solutions.	Getting people actively involved in the process of change. When the North America Region of the case study organisation rolled out their new performance management process, they were counting on leader's ability to embrace change. The new process was automated, and forced people in the field to use the technology piece associated with it.

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/10/2012 4:49:39 PM	So our HR director at the Grand xxx in New York said, "Christy, if nothing else, I don't have to file reviews and I don't have to have a list to track people down." And that's so simple, right? But that's probably the simplest description. He saw value, and he embraced change.	Importance of presenting value to drive people to embrace change.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/25/2012 7:18:51 AM	So the elements we're looking for most specifically now and we've crafted specific questions to get them to share a different side of themselves with us or not but to be able to identify who's willing and able to share, who is comfortable with that. Are they open minded? How do they handle change? To give us examples of change or when's the last time they were maybe in their last job where there was a change implemented and how did they feel about it. How did they work with the rest of their coworkers through that change? What was the outcome? You know and so on and so forth.	The lab hotels who were actively implementing the innovation by design process were also reviewing their selection criteria for new leaders. In view of the new approach, the ability to manage and embrace change became one of the key skills they were looking for.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 7 - Mark Hoptamazan and Jeff Semenchuk - Aug 2 2012	11/4/2012 4:53:34 PM	There were several things that were very attractive to me about joining xxx. First one was this gentleman to my left here who is an outstanding CEO and outstanding leader and I think those of you that have known him over the years have come to find that leadership is key in my experience in really driving change and leading growth and changing the way we do things because it takes courage and it takes vision and it takes insight but it also takes the ability to step back as Mark was saying and not always to direct or tell but to listen and to coach and to support. So listen for that as we talk this morning as we talk about what's happening across our company.	A comment by the Chief Innovation Officer about the CEO of the company, and why he was intrigued by this organisation.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/10/2012 4:51:43 PM	We're talking about just embracing change. And I think there's two camps on embracing change in our organization. And same thing, if we're really going to be a culture that drives change, then what are we going to do, which by the way, at least for North America, have we ever come and said, "You know what? You don't embrace change in your job, and therefore this is probably not going to be the place to work for you." I think we have never head on addressed some of those issues. And so you have the legacy environment that we have as an organization. And are we going to get serious about innovation and change being important, and if you don't do it, this probably isn't a good place for you to work. I think that's the question to ask.	A strong statement by one of the Corporate VPs about the importance of having leaders who embrace change, and of how this key skill has to become part of a leader's job in the organisation.
Impact of Leaders	Leadership skills	Change management	Skills around embracing change	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:15:45 PM	When we narrowed it down to two things, they said, "I want everybody who's interested in pursuing this one to step over here and everyone who's interested in this one to step over here." I think we had eight people in the room or ten people in the room. It was five and five. It was a split down the middle. Then they gave us an opportunity to talk about why we were passionate about each one.	
						Almost immediately, one of the managers said after listening to someone said, "You know what? I'm gonna go over there because hearing what they had to say I could see this more now." It's about like you said, that collaboration and putting it out there. It was. It was. They knew it was going to happen. They even said they knew it was gonna happen. It was interesting how you try and get people to come on your team.	
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:15:07 AM	I like his leadership style, one of listening and not knocking ideas even if an idea is silly, even if someone is shaking his hand and speaks just for the sake of speaking. I think there is that nurturing thing that he brings in and people need nurturing. People at all levels need nurturing. That's one good thing.	One of the Corporate VPs describes the qualities of the new Chief Innovation Officer, who came from the outside of the company having a fresh approach and not being constrained by previous history with the organization.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:54:23 PM	Another one of the challenges that we were having in that department was that if I'm going to transmit knowledge to my staff and I'm going to train my staff and I have different expectations I need to communicate that and then have very honest conversations with them to let them know whether they are meeting or they're not meeting those expectations and kind of that coaching process to guide them to where they need to be. And that was also lacking that coaching process. He was not very comfortable with looking at somebody in the eye and telling them you know, you did a good job or you didn't or you know so we had to review those skills again and provide that feedback so that he's better able now to speak to an employee and say I just saw you do X you did a fantastic job with ABC.	
						You know, follow our coaching model. That was the other area that we had to address Classroom and meetings are one thing but if he doesn't translate in to actions on the floor you wasted your time. You might as well not do it. So we kind of require both those skills.	
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:32:29 AM	But I think the number one thing is just for me is just encouraging and making them know that it was a positive thing, and training and just kind of being all over the place making sure that you're there because there's tons of questions. As you can imagine something that big, implementing something like that, with their education level for the most part, was tough. It was really tough. But I think all-in-all it went pretty well considering - I mean, you had your first couple of weeks, which were tough, but -	During the Middle Manager Focus Group, one of the participants recalls his experience with coaching the housekeeping team, in order for them to be able to embrace all the change that was happening. They all had to be trained in a new approach to cleaning rooms, and interacting with the guests. A huge task for the Manager to implement in a department with more than a hundred employees.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:58:55 PM	Dania the good thing about working for Dania especially in this lab process is that you always know where you stand. Dania will tell you if you do well and she will tell you if you don't. She's not mean or rude about it. She's actually very, very professional and very she has a soft approach to it. But she'll tell you. And I think that allows people to know when they're meeting expectations. She'll keep you informed. Another thing that a quality that she has that really helps in the process and gives her credibility is that she follows up. And if she tells you she's going to do something you can just put that money in the bank. It's going to get done. And that's not always the case right?	An example of one of the GMs from a Lab Hotel, who managed to change and adapt.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:29:27 AM	How do you feel it's your own business? That's the big question. How do you make people really believe that it's their business. One, you have to back up what you say with your actions, two you have to train and hold hands and nurture and three, give in a environment where people learn. Four, if they make a mistake, don't hit them with a two by four.	
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:36:51 AM	I could see him kind of you know, by his body language and sometimes he was going "Oh you know, I'm not sure something like that's gonna work." And so as we started biting it off in smaller pieces and kind of getting into it and stopped talking about it and just kind of doing it and then he got caught up in the process and he saw too that, "Well I can do this. And I can do this well actually."	Listening to one of the Lab Hotel General Managers, one can hear how she cares about coaching her employees to make them successful. In this case, she described how she helped a Housekeeping Manager, who was designated to become a Lab Leader, to manage the process. The Manager subsequently become more and more comfortable with the process, and was able to represent the hotel at higher levels as well.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:22:11 AM	I have always felt that a strong leader should be a person who is not scared or hesitant to surround himself or herself with people that are very strong, very bright, very outspoken, that can think outside the box, that are creative.	
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/15/2012 7:16:39 AM	I've never worked for a hotel like this before. I've been with four, five different properties with xxx and the support from the leaders in this hotel, it's incredible.	A participant during the Middle Manager Focus Group made an interesting comment about the leaders' ability to support and coach new managers when they arrive at the hotel.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:22:43 AM	No one has fostered an environment where, let me talk to you about there, let me help you get better. I think people talking about assigning coaches to someone and mentors and all that, I think we all need them, at every level. If you have another set of eyes looking over your shoulder, not to intimidate you but to say wow, you've done great here, but you still need these three or four things. That to me is an organization that is committed to learning, is at all levels.	
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:59:25 PM	She's persistent. She is direct about feedback. She's honest about feedback. She doesn't sugar coat things. If something is not looking good she'll tell you. But also she takes the time to teach you. If you don't know she'll sit down and show you.	Coaching qualities of a leader
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:44:45 PM	Sure, sure. I am now - so like my role in the LAB now and with the LAB leaders is really I'm not overseeing a project. I have all the LAB leaders and so I'm like the bee going around and pollinating all of the flowers right, so I'm there to - you know I show up and, "Tell me what you're doing. What are your road blocks?" So then I facilitate. "So tell me more about that? What else? How might we?" So it's more of a being there to inspire and just keep it unstuck when things get stuck.	A Lab Hotel General Manager describing how she managed to keep her team involved through coaching, in her own words.
Impact of Leaders	Leadership skills	Coaching	Giving individuals support to achieve their learning goals and improve performance.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:22:38 AM	If they have to learn the skills of the gift giving, of the ideation process, of coaching and of interviewing. Simply because not only do they have to hire a different type of people they have to lead a different type of team to where we want them to lead.	The importance of recognizing the skill of coaching to lead the new generation.
Impact of Leaders	Leadership skills	Collaboration	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/9/2012 7:37:53 AM	And so when we talk about behaviors, there's the idea of collaboration and not just in word, but in practice, collaboration and working through something that's global that might not be 100 percent of what it was before.	

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Collaboration	The skill of reaching out and collaborate across functions and geographies, and building consensus.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/10/2012 4:39:14 PM	But I would tell you that there's still that natural inclination of working together on the output. You know, a solid group where let's all work together, right? And then by nature, kind of the F&B people, still to this day, even though all the F&B people are different F&B people, right, ironically, but it's still the I know my stuff better than you know, right? And who are you coming from this and you don't know my background? So what value do you bring to this?	
Impact of Leaders	Leadership skills	Collaboration	The skill of reaching out and collaborate across functions and geographies, and building consensus.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/9/2012 7:39:11 AM	But when the consultants tasked them to say, "Well, what would that be if we all brought those ideas together?" there were fewer people, a small number of people in the group, who approached that as a challenge to come together and build consensus	
Impact of Leaders	Leadership skills	Collaboration	The skill of reaching out and collaborate across functions and geographies, and building consensus.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/9/2012 7:47:50 AM	Christy:Yeah. My answer – I don't know if there's a right or wrong answer. I think it's probably both. Right? It's both a skill and a mindset. And I don't – what made it work for me? There is no – I look at that as the expectation of my job. As a leader of my department and a participant in a function, and part of an organization, I naturally see that as that's how work gets done, right? That's an expectation of me. Whether that again, in written form or not, I believe that my capabilities and my ability to work through with others, is really how I am judged if I am successful.	How one of the Corporate VPs describes 'collaboration'
Impact of Leaders	Leadership skills	Collaboration	The skill of reaching out and collaborate across functions and geographies, and building consensus.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:13:32 PM	How difficult was it for you sometimes in the process not to take your solution? Because I think sometimes in our business it's like we know everything. We have the solution for everything. This process really works on collaboration or consensus. Was it difficult?	A comment by a Human Resources Director in one of the Lab Hotels, describing the importance of opening one's mind to other opinions, listen to others, and collaborate - thus producing superior results.
Impact of Leaders	Leadership skills	Collaboration	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Document Analysis\Internal communication\Message from the CEO - Oct 2012	10/10/2012 4:30:45 PM	I ask that as you carry out your responsibilities, you seek opportunities for further collaboration, coordination, openness to new ideas, efficiency and flexibility. Our behaviors – the empathy with which we listen to guests and colleagues, the speed with which we respond to change, our willingness to take informed risks and learn from our mistakes – are key factors that will ensure the success of our new organization and increase our ability to drive innovation, differentiation and preference during this exciting period of transformation at xxx.	A big statement by the CEO to all leaders in the case study organisation, that 'collaboration' is one of the key skills.
Impact of Leaders	Leadership skills	Collaboration	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/10/2012 4:36:20 PM	I see the strong leadership skills of our collaboration, curiosity, flexibility, listening, consensus building.	
Impact of Leaders	Leadership skills	Collaboration	The skill of reaching out and collaborate across functions and geographies, and building consensus.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/25/2012 7:14:34 AM	They had an ability to share their emotional, be vulnerable. They were open to comment or collaboration, willing and able to be in a group where they could listen and they could hear everyone's ideas and be very respectful and build on those ideas. You have that radical collaboration piece developing.	The General Manager at one of the Lab Hotels describes the successful individuals in her hotel that were very quickly embarking on their journey of innovation and continuous learning.
Impact of Leaders	Leadership skills	Collaboration	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/9/2012 7:43:27 AM	Yves:Okay, very good. So would you say collaboration is one of – is collaboration a skill a leader should have? Is this something a leader possesses? Is this something a leader learns? Is it something they're born with? Christy:Yeah, that's a good question. I don't know that I know the input – I can put it in context of this organization, but it's the only organization I've worked in for a very long time. So I think it is something a leader must possess. And because working as a team – if you're always – we don't have – at least as our organization, we don't have any one individual leader that is solely not – we're interdependent. So even if you have your own beliefs and your own trajectory and your own strategy, that we're still interdependent because the outcome or our customers are the same. Right? We have the same customers.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:28:21 PM	Amanda Koehler:He's very straightforward. You know exactly where you stand with him. He's direct in a good way. He'll tell you like it is I think. I think I always know where I stand with him. There's no guessing.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:42:36 AM	I think a manager, they manage a day to day business and they really get involved hands on and they really get into the nuts and bolts of it. That's also a little bit the expectation that the senior leaders have of everybody within the organization, but more me a leader is somebody that has a vision, that spends a lot of time communicating that vision, double checking, always making sure that the expectations of the guests as well as the employees are somewhat at least understood, that if necessary evolves if fine tunes or changes the direction but they have a very clear vision of where they want to be.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/11/2012 2:37:54 AM	It's interesting being a project hotel that there's nothing that's really concrete or that we have to do; it's kind of all up in the air, us implementing different things and changing them to what works and I think one of the biggest things that I've seen that's been a plus from my direct manager is just communication. I mean, we – I think everyone here will say that we are an extremely busy hotel without something like Project X go on, and for a lot of this to get put on his plate, to juggle that along with just the daily operations has been pretty incredible, and how he did that and how he communicates and how he rolls things out and makes decisions and those sort of things.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Individual\Interview 4 - Pedro Irlizarry - July 20 2012	10/24/2012 6:53:08 PM	Pedro:They were in a couple of initial meetings where we tried to introduce the ideation concept. It just didn't work. I don't know – well, I do I know. It was a lack of presentation skills. He was a lack of being able to conduct an effective meeting. What we learned was that in order for us to expect a manager to be transformed or to learn and grow in to what we need him to lead our teams there needs to be a basic foundation and we cannot just assume that they have it. And I think that was our mistake. I think our mistake was – Yves:Everybody knows how to conduct a meeting –	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Individual\Interview 4 - Pedro Irlizarry - July 20 2012	10/24/2012 7:25:04 AM	They need to learn not to ask leading questions.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Individual\Interview 4 - Pedro Irlizarry - July 20 2012	10/24/2012 7:24:00 AM	We do our version for a xxx talk is actually an ideation session. And managers have had to learn a different style of management of that meeting. In the past the xxx talk was basically the manager going in and saying what do you think. How are we doing? And they would leave the meeting with a list of things they needed to do to keep employees happy and engaged and whatever. Well, we don't do that any more. We ask them the questions what slows you down? What can we do better? But the list of things that is created is things that we're going to work together as a group to fix it so it stops being this list for the manager to go handle.	
Impact of Leaders	Leadership skills	Communication	Changing the conversation.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:43:10 PM	We think we know everything, right? So what this process has done has totally flipped that on its head and now we're actually gonna talk to you about it and we're gonna have a different conversation. And with our associates and with our customer and it's made a complete culture shift within the building. It is evident in the comments that we're getting on our new MPS high set comments that our associates are creating this moment and having a different conversation with their customer as well.	
Impact of Leaders	Leadership skills	Customer focused	Focus is more on customer satisfaction than continued improvement and innovation.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:43:44 AM	Robert:I think it's positive. I think that they see that we're trying to better our product and to make the guest happy, and obviously more business means more hours for my housekeepers, so from that standpoint they see the benefit of it and they like the idea that xxx is doing something, trying different things, to better the product.	
Impact of Leaders	Leadership skills	Emotional Intelligence	Recognize their own feelings.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:42:07 PM	"What else can you tell me?" "Well I don't really know. Just show up and we'll figure it out." "Okay." So it has just been really incredible. So what's happened to me is that I early on learned about myself that as a leader in xxx, 22 years in xxx, that I had – and what I see that we often do – is that so we have an associate issue or we have a guest issue or a problem or whatever it might be and so we have a dialogue with our self or with our friend general manager up in the city or we call corporate office or we always look internally to solve that problem. And so then we go back to the guest and say, "Okay well here's your answer."	
Impact of Leaders	Leadership skills	Emotional Intelligence	Recognize their own feelings.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/25/2012 7:13:50 AM	And the different characteristics that those people possessed were that they had creativity. They were somewhat fearless. They had an ability to share their emotional, be vulnerable.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other's shoes.	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/4/2012 4:50:16 PM	A long time mentor and friend of mine recently reminded me that there's a reason we have two ears and one mouth and that is you're supposed to listen twice as much as you talk and actually that is the key lesson in how we're approaching, performing better and being the most preferred brands in the marketplace. That is to say that we are taking a very refreshing approach to really making sure that we understand what's going on with our guests and figuring out how to go about serving them. This is not a passive thing. You have to be actively engaged and listening very, very intensively and making sure to take what you've heard and translate that into something you can take forward and take action around.	The opening address of the case study organisation's CEO, emphasising the importance of being empathetic.

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/25/2012 7:31:28 AM	And so then I said, "Well call her, talk to her, ask her." And so sure enough the hiring manager contacted her and sure enough, "Yes my ultimate goal is to go to law school. And so on and so forth. So we passed on her and to me that was an example of being sure that we're asking all the right questions, that we're really understanding what's important to that candidate and really hiring the people that are aligned with our goals and hiring people that we can bring in and develop them within our company ideally right."	An example of how empathy can be applied towards finding out the right things about candidates during the selection process.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 3:57:15 PM	And we went through this after we were all together with the Global Passport, I was on that empathy interview with our banquet manager at the time and we went around to the airport, to the Hilton airport and we started talking about these high performance meals and what do you like best about the meeting. Everyone across the board was like I like this really nice dinner, because they feed us these good steaks and this great wine and the food. They're all about. We asked don't you live a healthy life style and would you prefer to be fed healthy food. It's like only away at these meetings a couple times a year. It's kind of a nice thing to be pampered with this really cool food, this unhealthy food basically.	An example where show empathy, and asking the right questions, assisted a team to elicit the real wants and needs of customers.
Impact of Leaders	Leadership skills	Empathy	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:38:58 AM	Charles Fusco:They higher performance menus, they were a failure. Kelly Toboja:They were a failure. Charles Fusco:We tried to give our guests something that they didn't want and they failed. Kelly Toboja:Because it was the right Charles Fusco:Because we didn't do interviews. We didn't ask again what they wanted.	Without empathy, and without the willingness to ask questions and find out more, it is difficult to take informed decisions and make things work. An example from a project between the culinary and catering departments at one of the lab hotels.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:40:27 AM	Debra: I do. I think that empathy interviews are really interesting because what your focus could be can turn into something completely different because you're asking open-ended questions. So you may go in there thinking, "I'm going to find out why, how this guest thinks the room is clean," but you're going to come out understanding that they always forget their toothbrush and how that can be more accessible to them. So that's a really cool thing about empathy interviews. When I did my empathy interviews I actually did internal guests, our co-workers, and I thought those were very easy to do because we all like to talk and I think that we also have a very unique perspective when it comes to traveling because we are both ends of the spectrum: we provide the services and we use the services. So that was very cool to talk to our coworkers about that.	A great example by one of the middle managers who was actively involved in empathy interviews during a innovation-by-design exercise.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Document Analysis\Internal communication\Email from Jeff on Empathy and Empowerment	10/26/2012 6:30:47 PM	Everyone kept talking about Empathy + Empowerment. I wasn't leading the witness, promise! They said the combination of the two is what is making the difference. Their new Rooms Executive (Alexandra Bueno who came from Marriott and who is going to be the next xxx Thinking rock star!) has been there for two weeks and said she's never seen anything like what's happening in the Sao Paulo hotel and that she believes it's the combination of empathy and empowerment that is driving everything. And then that leads to greater colleague engagement and guest satisfaction.	An extract from a communication from the Chief Innovation Officer shows how well the 'empathy' part of the process was received by newcomers to the organisation.
Impact of Leaders	Leadership skills	Empathy	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Document Analysis\Internal communication\Message from the CEO - Oct 2012	10/10/2012 4:30:45 PM	I ask that as you carry out your responsibilities, you seek opportunities for further collaboration, coordination, openness to new ideas, efficiency and flexibility. Our behaviors -- the empathy with which we listen to guests and colleagues, the speed with which we respond to change, our willingness to take informed risks and learn from our mistakes -- are key factors that will ensure the success of our new organization and increase our ability to drive innovation, differentiation and preference during this exciting period of transformation at xxx.	An extract from a key message by the CEO to all associates in the organisation, following the end of the re-structure, emphasised again on the importance of empathy.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/11/2012 5:25:35 PM	I had to learn to ask more questions and I had to learn to dig deeper as opposed to thinking I had to come up with the solution. I still have to come up with the solution but it enabled me now to actually ask more questions.	Great quote to showcase the importance of 'empathy' on one hand, and of 'learning' as well.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 6 - Joseph Khairallah - Sep 1 2012	11/2/2012 7:24:37 AM	I just think that the way you teach people and the way people become receptive to learning and the changing is by knowing that someone is nurturing them. If you think your boss gives a damn about you, cares about you, you are going to give. Everybody wants to be loved, in a good way that is.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:17:57 PM	I remember becoming a director and being very like it's five minutes past eight o'clock. Where have you been? I mean I'm not like that anymore. I'm much more through my years and my age, I've become more Charles Fusco:Wise. Amanda Koehler: I guess. I don't know. I guess I'm a little softer, like I have a gal that her husband works late every night. He works a restaurant. He's a sommelier so she stays up late to see him every night. Well I have empathy for her so now her hours I've adjusted. I would never adjust hours for anybody for any reason. But now she comes at 8:30-9:00 but works later so that she can sleep in a little bit after she sees her husband at night.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 9:14:19 AM	I think -- probably because he's got a team now, I mean he's had, but probably because he's a team, I think they will go back and do more research around it because his No as partly the one responsible to make any of this happen and has already said, we've set up focus groups, we've set up meetings as part of our staff meetings, as part of the exco meetings.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:09:57 AM	I think it was a good thing for us because we learned the importance of getting customer feedback. I guarantee all of us in our careers have been told our whole life just go out there and make it happen. Just figure it out. So we go out there and we do the best we can. We make the decisions based on what we think is right and we don't talk to anybody else. I think it was very eye-opening to us that even though we've been in the business for 20 years or 25 or whatever it is, we don't know all the answers. It's important to listen what the customer says and feels and thinks.	Another example of a situation where 'empathy' would have made a difference, following the failure of a project around the 'I forgot bar'. A lot of money and effort was spent on this project, which only led to the group realizing that they created something that was not serving the needs of the customer.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:23:18 AM	I thought -- I obviously didn't know women as well as I thought but that's another story. I was at a meeting and there was one of our colleagues there that talked about the fact that if they didn't have a toothbrush with them, they would not call the guest request line. They would go downstairs, even go outside under the street to a gift shop to get a toothbrush because they felt uncomfortable calling and they felt uncomfortable with somebody delivering it to the room. I could not believe this. I could not believe this was true because I've always known that when you forget something you call and they bring it to you and I have no trouble with that. So I started to research that myself, I started talking to women about that, a lot of women over the course of three or four months. I worked on several empathy sessions on this particular topic and I found out it's really true that there are a lot of women who do not like that process for a lot of reasons and some of those are really deep reasons why they don't like it. So that kind of amazed me. That led us to prototyping on some new ideas on how to change that process.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:02:19 PM	I truly believe it was through the empathy, the going back and the getting the additional feedback, knowing his team, supporting his team and listening to what they had to say and not being afraid to make some adjustments along the way.	
Impact of Leaders	Leadership skills	Empathy	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:25:15 AM	Interestingly enough one big mistake we made like last December before I went through this process, we renovated our locker room, employee locker room and my engineer and I worked on it based on what we thought. Then we come to find out that we see all kinds of benches and chairs all around there not really understanding why this is happening but I think if we would've went through this process, we would've found out much better which would've worked out for our associates. So it was a mistake we made so I think that's one bad example. It was basically me thinking that's what my customers and employees wanted where was a combination of managers within the hotel thinking about what we wanted as opposed to asking the true person, "What's important to you? What do you want?" And asking them those questions and truly getting the feedback and going deep down into not what the surface might be but then asking why like five times.	Another example of something that did not work out, because nobody asked the right people the right questions.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/11/2012 5:24:43 PM	Let's go ahead and not only interview the employees who are doing the actual check let's interview the guests that are being checked in. Let's gain some insightful information. Then we gained that insightful information after quite frankly, laying on the ground.	Combine with below
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/10/2012 5:07:47 PM	Right, but if you have people walking around at xxx thinking, I'm only a small officer here who is holding the reins and whether I like yellow or blue, it doesn't matter, if my employees don't like it, if the city I'm in hates yellow then I'm not going to put it. If you start thinking that way, that's empathy but unfortunately we tent to sometimes think, hey what's my title, what's my name? This is how organizations don't do well, become the roman empire.	Combine with above.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:08:50 AM	So I wasn't till after we went and learned this whole process of empathy to figure out that that's not really what they were looking for. They weren't looking for it to be. They were still just meeting this need to get something privately. So we started having these empathy interviews with customers and trying to figure out what would work better. That's when we started to learn that really all they wanted was some sort of unobtrusive way to get what they wanted.	Interesting comment from a participant from the Middle Manager Focus Group, describing 'empathy' as part of a learned process and not an inherent characteristic.

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 10:08:28 AM	So the Chinese consumers' perceptions and attributes, the things that they think about when they think about luxury items has changed a lot over the last four or five years. you're not in tune with that and you're not actually interpreting that and embedding it what you do and how you go to market you can be 20 years out of sync pretty easily. So this idea that people, a lot of our guests felt that we were stuck in the '80's should resonate with us. We should say, "Okay, what does that really mean?" Not, "Oh they don't know what they're talking about, I know better." Dave just explained to you how he came to realize that he didn't. Well why do they feel that way? What's behind that?	The CEO during a recent town hall meeting, describing the importance of empathy overall, taking an example of customer expectations and experiences.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:29:54 AM	So the Grand xxx San Francisco is one of the lab hotels and they decided in their early days to get themselves going, so they came here and they came here and started mocking up different types of front desk designs but they did it very rapidly and very crudely, it wasn't fancy. So they came up with a couple of ideas and then what they went to do is went back to San Francisco and they built them, prototype them. But then again they didn't hire fancy designers and expert carpenters, they didn't finish them. It was very, very, very crude and rudimentary and they started inviting guests and colleagues of ours into this room where they had the front desk and they started mocking up interactions with guests so they started experimenting with it and they learned in an enormous amount and they got a huge amount of feedback but one of the most valuable lessons that I heard and that they learned which I have to thank Dave for I haven't had the chance to do this is if you actually were to make it a high standard and make it beautiful, you won't get good feedback because people show up and they say, "Well they put all this effort into this and I don't really wanna hurt their feelings." If you make it crude and say, "You know, we're just experimenting with this." And you can tell this is just a mockup then people say, "Okay, well I guess they're really looking for my feedback." And then they actually bring great feedback. Now you have to listen again two to one ratio. You have to listen very intensively and they came up with a completely unique design, it's really cool actually.	example of an innovation project at one of the lab hotels, around designing a new check-in desk.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 4 - Pedro Iizarry - July 20 2012	11/5/2012 7:25:49 AM	So what we've started to do, is really understand the employees journey from the time they wake up to the time they leave and go home to work and what takes place in that process and when you come to find out there's a lot of things throughout that day that affect the employee's life. So we did some intensive empathy interviews with many different employees about this. We're focusing on several areas. One area of example is some of the hours that our operational managers work are very long and when we looked into it, we found out they were doing a lot of unnecessary reports that many people didn't really need. We found out that they needed the services of human resources and accounting but human resources and accounting was more of an 8:00 to 5:00 Monday through Friday. Our hotel's operating 24 hours a day so we started to change the hours in some of these areas so these evening employees have access to it and we've taken away some of the reports and we're still working on it. Hopefully we're changing that quality of life for those individuals. That's just one area we're focused on. We're looking at an employee lounge. We've heard there's been some good success at other hotels.	Empathy can be applied to all areas
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 4 - Pedro Iizarry - July 20 2012	10/24/2012 7:20:05 AM	They have to learn the skills of the gift giving, of the ideation process, of coaching and of interviewing. Simply because not only do they have to hire a different type of people they have to lead a different type of team to where we want them to lead.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:25:39 AM	They people who care about, they go out there and give you things that make you feel like you're on top of your world. That's one thing that I learned. The biggest thing for me that came out of lab is listening to your customer and to me our customers are not only the paying guests.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:25:08 AM	To me that was a big thing is this empathy interviews with the customers and the employees is to learn to care about someone and ask them what they want. That was the biggest impact that Jeff brought in because one rings very loudly in my ears, when he talks about Apple, how it's a cult, not only company. How they create a set of followers versus customers is because they do send out products that people have emotional attachment to them. They make you feel cool, they make you feel something, and they connect you with something.	
Impact of Leaders	Leadership skills	Empathy	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:29:18 AM	Todd Byrns.No, I think so. I mean we've learned. I learned the hard way. Our general manager always gives an example that he and our director of engineering, between the two of them they've got probably 55 years of experience. That sounds right? Kelly Toboja.Yeah Todd Byrns.We redesigned the employee locker room. Never spoke to a single employee. We put things in it we thought we would like: a couch, a TV, a this and a that. Kelly Toboja.We don't have a couch and TV in the ladies. I just want to point that out. Charles Fusco.They forgot benches. They forgot Todd Byrns.Never even spoke to a woman period to ask her what she wants in hers. Kelly Toboja.We just had to empty the lockers. Todd Byrns.So, yeah, I think it can be taught. I think we're all learning. That's probably the most eye opening thing in this whole Project X for us is that's the take home. You have to think. You have to redo the way you think through processes.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:26:29 AM	Very good question. To be empathic, that's part of you. You either have warm blood or you don't. You either care about people or you don't but most of the employees that work in the hotel industry, they have chosen this industry because they care.	Another perspective by a corporate VP, who believes that empathy is in you - a personal characteristic and not a skill.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:50:28 AM	We decided to tackle the bistro. This was while David was gone. The salad bar that down there now, what we did was we got input from associates. We put fishbowls on the table. We did empathy interviews, "Here's what's new today." We started making changes. We started informing the associate of the changes that we were making via a whiteboard, via a flipchart and then ask them for their comments about the changes as opposed to just going out there saying, "What would you like to see," because we can't do filet mignon and lobster and everything everyday.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Individual\Interview 4 - Pedro Iizarry - July 20 2012	10/24/2012 7:23:31 AM	We do our version for a xxx talk is actually an ideation session. And managers have had to learn a different style of management of that meeting. In the past the xxx talk was basically the manager going in and saying what do you think. How are we doing? And they would leave the meeting with a list of things they needed to do to keep employees happy and engaged and whatever. Well, we don't do that any more. We ask them the questions what slows you down? What can we do better? But the list of things that is created is things that we're going to work together as a group to fix it so it stops being this list for the manager to go handle.	Use of empathy for employee engagement.
Impact of Leaders	Leadership skills	Empathy	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:22:19 PM	We use an example at this hotel of why this design process makes sense. We wanted to renovate our locker rooms and at xxx we want to solve the problem, make it happen, right. Whatever the issue is, make it happen, solve it. We have the solutions, exactly. So we wanted to renovate our locker rooms so we had a little bit of capital expenditure left so our general manager Dave and our director of engineering went down and decided what needed to be changed and they made the changes and it looked great. But after going through this design process training Dave has recognized that was not a good way to go about it. We did not ask any of the employees what they wanted to see in these locker rooms.	failed project, if no empathy is applied.
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:39:54 AM	Well, it's basically taking, going up to a guest and have a certain question to ask such as, from a housekeeping standpoint, our sticky notes, "Do these benefit you? Do you think that the room was cleaner because there was this note on the mirror?" It's basically asking questions and -- I don't know, just find out reasons why they did or they didn't think it was clean. That's just an example. I mean, there's that, there's any aspect of Project X you can ask that question. "Did the 'I forgot bar', was that beneficial for you?" So that's kind of empathy.	
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other-s shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:33:10 AM	Well, number one, it's to benefit the guest and that's what we're all here for. As long as they know that, and a lot of them jumped right on board and understand that. It initially made it a little more difficult for the housekeepers just from a movement standpoint. They were pushing their cart more, moving a little bit more. We've kind of ironed all that out but obviously we want to have a balance between helping the guest and not making more work for the housekeeper. With that being said, I think we're in a good spot now but it was tough from a technology standpoint, too. I have ladies that have been here for 40 years and some that can't read and some, obviously a language barrier but we train for two weeks. They are actually on-site to help us start it up.	

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Empathy	Able to ask the right questions, gain insight and put oneself into the other's shoes.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:41:24 AM	<p>Yes.Do you think conducting empathy interviews is easy? Difficult? Strange?</p> <p>Rachel Uncomfortable.</p> <p>Yes.Uncomfortable? Okay. Rob?</p> <p>Robert:Yeah, absolutely. You're invading someone's space without -- I mean, you're asking them but it's different. Once you get into a conversation it's fine but it's that initial, "You guys have a couple of seconds? I've got some questions I'd like to ask."</p>	Not easy to learn the skill of 'empathy'.
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 4 - Pedro Iritzary - July 20 2012	10/24/2012 6:56:43 PM	And they came up with a lot of feedback. And I think that was a great success first because it achieved results quickly. They didn't have to wait till the manager got back to them. They had the permission to go fix it. And the result has been higher engagement people really very, very excited about the process. And a more effective operation. Actually when we're done I'll walk you over there so you can see it. It's just fantastic.	In one of the lab hotels, managers were empowered to 'fix' issues that came up during their empathy interviews - both with guests and employees.
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Document Analysis\Internal communication\Email from Jeff on Empathy and Empowerment	10/26/2012 6:30:50 PM	Everyone kept talking about Empathy + Empowerment! I wasn't leading the witness, promise! They said the combination of the two is what is making the difference. Their new Rooms Executive (Alexandra Bueno who came from Marriott and who is going to be the next xxx Thinking rock star!) has been there for two weeks and said she's never seen anything like what's happening in the Sao Paulo hotel and that she believes it's the combination of empathy and empowerment that is driving everything. And then that leads to greater colleague engagement and guest satisfaction.	In a communication from the Chief Innovation Officer to senior leadership in the case study organisation, he told the story of a new leadership committee member that joined the company, and what his observations were.
Impact of Leaders	Leadership skills	Empowerment	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:43:43 AM	I don't think that today's managers or potential leaders are attracted to somebody that micromanages them. You want to have the opportunity to bring your own personality to the job.	The new generation needs to be empowered, and leaders have to get out of their way to let them grow and be 'authentic'.
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 17:22:17 AM	I have always felt that a strong leader should be a person who is not scared or hesitant to surround himself or herself with people that are very strong, very bright, very outspoken, that can think outside the box, that are creative.	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 17:23:43 AM	Mind you, not everything they thought of has been a home run, but the employees have been liberated. This is a big thing.	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 14:35:51 PM	Right, yeah just have to get out of the way and kind of let it happen.	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 1:46:55 PM	Skill wise, I think the skill of really effective delegation and allowing the work to happen where it's closest to where it should happen so if we're innovating something for the front desk, allowing that responsibility and authority to be at the front desk as opposed to the GM.	Comment by the VP for leadership development, who recommends the focus on delegation and empowerment in order to foster innovation.
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 14:44:51 PM	Sure, sure. I am now -- so like my role in the LAB now and with the LAB leaders is really I'm not overseeing a project. I have all the LAB leaders and so I'm like the bee going around and pollinating all of the flowers right, so I'm there to -- you know I show up and, "Tell me what you're doing. What are your road blocks?" So then I facilitate. "So tell me more about that? What else? How might we?" So it's more of a being there to inspire and just keep it unstuck when things get stuck.	One of the lab hotel General Managers describing the importance of letting the employees in the hotel participate and manage the various innovation projects.
Impact of Leaders	Leadership skills	Empowerment	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:24:07 PM	That you don't need to be -- In other words, the operation is not going to fail because you're not there. Because you're not there to work that 14th hour and when you left things just went to hell. It's letting go. It's that grip of power that you expect you senior members to be there at every facet of the operation so that things do not fail. Then why do I have layers of managers and I trust my managers implicitly. If they cannot do the job, then that's a different story. That's really the issue.	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 17:28:47 AM	They said the one style that seems to work is empowerment and within that they were talking about empowerment is. It's becomes a cliché right. Empowerment is to say, Eve, this is your company, this is your business, it's got your last name on it. The minute you start feeling that it's your business you are going to do a great job running it.	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:08:18 PM	Well one thing, when I was in Santa Clara and I spoke with Dana, she said one of the biggest things, the learning curve for her was to learn how to get out of the way to let people do their job. Now this is very much a senior leader skill. So is that something that would be different for a middle manager if you looked around or are your middle managers aren't a more conforming, because you guys are the ones who put the processes in place and they're just going to follow that design process or whatever?	
Impact of Leaders	Leadership skills	Empowerment	Delegate decision making.	Internals\Interviews\Individual\Interview 4 - Pedro Iritzary - July 20 2012	10/24/2012 7:09:44 PM	<p>What activities would you like to have in the cafeteria? And they would give me answers and it was the job of one of the cooks in the kitchen was part of the Phoenix team to go gather those responses, send it to the appropriate managers, gather the managers responses and update people update the associates on what's going to happen. And I found myself going every day to the cafeteria, taking a picture of the board and following up on every day. And the reality is that if I'm going to do that I might as well do it myself. And not have her do it. I found myself well, that's silly. I'm doing what I'm asking her to do simply because I don't trust that she's going to do it.</p> <p>So I decided you know what for a week I'm not even going to go look and see what happens. And she did a fantastic job every day. She took her picture, sent it to the managers, updated the boards it was in my case just get out of the way and they'll do a good job.</p>	An example from a Human Resources Director on how empowerment resulted in superior results, during a project of revamping the employee cafeteria activities.
Impact of Leaders	Leadership skills	Empowerment	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 17:17:51 AM	Yes, very true. We have in our organization because it is driven by customers' expectations, we have always been, follow rules and here are the rules, read them, learn them, live them. That is how my dad wanted to see hotels ran.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/10/2012 5:09:15 PM	Now the younger generation is different. They want emotional connection, they don't want people bowing.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	10/10/2012 5:09:15 PM	At the end of that exercise what we ended up doing was coming, Kristen then relayed all of that information to the designers and the designers basically eliminated three of the five drawings and presented us with two drawings. Based on those two drawings we had low-resolution prototypes made out of plywood. Maybe a little bit higher resolution than the banquet tables but still very low resolution that didn't cost us a lot of money and that people would really give us feedback based on that as opposed to this beautiful \$100,000.00 desk that people would be a little bit hesitant to give me feedback on because you already built it and spent a lot of money.	The General Manager of a lab hotel describing the importance of experimenting, and using prototyping in order to collect valuable feedback before a final test and launch.
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:34:19 AM	but placing more of an emphasis on how you lead and manage ambiguily I think is a bigger deal.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:47:43 AM	I can kind of visualize it in my mind as to we've tried some things and come up with all these ideas and we built a prototype and then we raise it up a little bit more and then a little bit more and then we realize like, "Oh, you know what? It worked better one step back from here." We realized when the design school team was here with us too that it's okay to step back and say, "We don't need to make this any fancier. It was good where it was here." We took it a step up and it wasn't as effective. I'm talking about the mobile concierge.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:50:06 AM	I think that the shift also -- or not even the shift -- but I think there also needs to be a huge amount of attention played to the creativity of a person, back to, like, a personality type thing because anybody, I think, with the innovation process anybody can be innovative. You just have to have an open mind and go with the flow -- pardon me, I'm so sorry -- go with the flow and be willing to take chances and have an open mind to it. So rather than just being focused on somebody else, you also have to focus on yourself and how you can do that, what you can do to make a difference, so kind of shifting a little bit.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:24:30 AM	<p>Jeff:Good and how about you experimented with host, iPad, at sort of remote locations.</p> <p>David:One of the biggest impacts we've had is our iPad check in. With the help of some people at corporate IT, we were able to put together an iPad that can check a customer in virtually anywhere and in our case we have a lot of customers come in to the airport since we're right next to the airport. We go to the airport and we can check them in while they're waiting for the shuttle bus. We can make their key. We give them a key packet. We give them some directional information so when they arrive at the hotel, they can go straight to the room without going to the front desk. Out of those people that check in on the iPad, we've got over a 95 net promoter's score, just on the iPad.</p>	An example of a successful experiment in one of the lab hotels, addressing the problem of slow check-in during peak hours.
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:49:18 PM	Okay so I guess a couple of weeks into our LAB launch we started experimenting with whiteboards.	

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:08:30 AM	So before we knew this process, there were no empathy interviews. There was no ideation. We basically just came up with what we thought would be the best way to accommodate that. We put together and spent a lot of money, a lot of effort in putting together this bar in the lobby that just allowed people to come and take things. We found out after about four or five days that that was a disaster because it wasn't really serving the needs of what we were trying to accomplish. It was just becoming a free fall.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/15/2012 7:29:46 AM	So the Grand xxx San Francisco is one of the lab hotels and they decided in their early days to get themselves going, so they came here and they came here and started mocking up different types of front desk designs but they did it very rapidly and very crudely. It wasn't fancy. So they came up with a couple of ideas and then what they went to do is went back to San Francisco and they built them, prototype them. But then again they didn't hire fancy designers and expert carpenters, they didn't finish them. It was very, very, very crude and rudimentary and they started inviting guests and colleagues of ours into this room where they had the front desk and they started mocking up interactions with guests so they started experimenting with it and they learned in an enormous amount and they got a huge amount of feedback but one of the most valuable lessons that I heard and that they learned which I have to thank Dave for I haven't had the chance to do this is if you actually were to make it a high standard and make it beautiful, you won't get good feedback because people show up and they say, "Well they put all this effort into this and I don't really wanna hurt their feelings." If you make it crude and say, "You know, we're just experimenting with this." And you can tell this is just a mockup then people say, "Okay, well I guess they're really looking for my feedback." And then they actually bring great feedback. Now you have to listen again two to one ratio. You have to listen very intensively and they came up with a completely unique design, it's really cool actually.	The CEO describing the innovation process at one of the lab hotels, where the hotel conducted a number of experiments to find a solution to a problem.
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 9:10:59 AM	The blanket willingness from the people that have been involved to just experiment. There's a downside to that too. We'll get to that in a second. That goes back to your plan of kind of find a specific example and tell the story by the example. That would be one of the examples. But I am far more surprised than I thought I would be initially in both the lab hotels as well as the corporate function which right now is Gold Passport, it's used as a lab but the individuals involved in that are almost wildly willing to experiment and challenge the convention and challenge the status quo and challenge how things are done.	An observer from the corporate office after his first lab hotel meeting, commenting on the importance of experimenting.
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Iritary - July 20 2012	10/24/2012 7:06:41 PM	The reality is that we changed it and we took that failure and the way we adjusted was - what the real problem is that people forget stuff. And I want to be able to allow them to borrow it. But I don't want to man a whole station with somebody there and get your id and get a list to make sure they return them because that's not the purpose to make you feel like you're taking out a loan. You know to get a charger. So what we identified was to say well, there's a lot of items that we have in house that never get asked. Maybe it's because the guests didn't know we have them. And that we have them available. And I'm going to be very honest after working in this industry since I was 18 and I'm a lot older now I never knew we had humidifiers in hotels.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:48:03 AM	We had to step back and say, "Hey, we went a little too far. We need to go back to where we were at. We were way more effective there." I look at those same things and I know our managers do too in the qualities of leadership of our managers at the hotel, whether we're hiring them in or continuing to develop them.	A Human Resources Director describing the quality or skill of experimenting, and being able to step back and stop a process before it is too late, if one feels that it is not working.
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Iritary - July 20 2012	10/24/2012 6:50:22 PM	What was that quote. When the light bulb failed for the thousandth time well, I found one more way that it doesn't work.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:47:14 AM	When they make those mistakes, which we all do, how do they react to them and how do they respond to regroup and like, "Ooop, that wasn't the right thing to do," and then going back and learning from it. That's what this Lab process is about too.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:31:39 AM	Whether we adopt that or not, I'm not sure. That one, it was a big thing when it came to employee morale, then feeling good about themselves and two, it really cemented in the employees eyes the notion that that leader, that General Manager means business when it comes to innovation, not only lip services.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:33:20 AM	Yeah. We're used to it. We're constantly being given new things to try and experiment with so it comes quite naturally to most of us.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:49:17 AM	Yves: Good point. Any other opinions? Any other skills you'd be looking for if you were the GM and you had to hire an MC? Or in your own departments, have you ever had hire an assistant manager? Team leader? Manager? Debra: Willing to try something and fail.	
Impact of Leaders	Leadership skills	Experimentation	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:51:19 AM	Yves: We talk about the need for experimentation. Do you think that's an individual skill or is it a manager's skill to let people experiment? Robert: Both. Like personally speaking, it's harder for me to see within myself than it would be to see in others but I think if you're truly an innovator, you need to be open to both internal and external. Yves: As in go on an experiment yourself, not be afraid of failure, like Rachel said? Robert: Right.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/3/2012 6:54:44 AM	In regards to things that have failed in leadership and how we've seen it, I think a good example would be the I forgot bar. Initially came in with the idea that all of items would be available in the lobby and we built this great structure in the lobby that would house shampoo and toothpaste so guests wouldn't have to have the inconvenience of calling down and waiting for somebody and this is probably our best situation that we could say we failed and failed fast. Basically, the entire thing was ravaged by airline crew that would come in here, the flight attendants, the flight attendants, they would take the whole thing.	A great example of a failed experiment in one of the lab hotels, where they setup a facility for guests where they could borrow items they may have forgotten.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 7:55:41 PM	Like I said, this process really allows people to be leaders; everybody, all levels. The reason that it does that is think about what holds people back from speaking up. What holds them back is fear of failure. The whole design thinking process is all about failure.	A great quote by the General Manager of one of the lab hotels, emphasizing that the only way to encourage employees to participate, learn and try out new things is by taking away their fear of failure.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Iritary - July 20 2012	10/24/2012 7:05:23 PM	Again we learn from our failure there but I think that's part of it. I think that's exactly what we're talking about. If you don't learn from it -	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 7:56:07 PM	And then you learn from it and then you move forward. I think that we look for the same people we would look for anyway that we've been looking for for years. We've always looked for people who have an outgoing personality, that have great attitudes. We always look for those people. Then with this whole design thinking process in creating the culture, it enables them to not be fearful to truly speak up.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:33:20 AM	Another example that hit home with me is when we were in Sao Paulo and we were trying to do employee related concepts, not guest related and one of those things was to remove the formality of the uniform. Take off the tie, let the ladies put their hair down. Yves: Give! Um hum. Joe Khairallah: All of that didn't resonate well, neither with the employees not with the guests. Yves: Give! Okay. Joe Khairallah: Even the guests we interviewed said to us, we've come to the Grand xxx Sao Paulo because it is known as very classy environment.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:30:03 AM	How do you feel it's your own business? That's the big question. How do you make people really believe that it's their business. One, you have to back up what you say with your actions, two you have to train and hold hands and nurture and three, give in an environment where people learn. Four, if they make a mistake, don't hit them with a two by four.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:51:47 AM	I don't think the whole point of the innovation process was to be really, really good at it was just to try it. I think we were really, really good in one field, but the failing has been some of the best experiences that we've had, especially with the "I forgot bar" that we lost.	A Middle Manager Focus Group participant commented on the feeling of failing, which was considered as good in the context of learning and innovating.

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:16:14 PM	I love it. I just give it a shot and if it works it works. And I think the trick is to be open about it. I think that when you take away the expectation that you have to be successful at everything you try and what is recognized is the fact that you tried. I mean intelligently tried. Not somebody that wants to try every stupid idea they come with. Then you're free to experiment. So if you're not afraid of failure because it's part of the process and it is expected that a number of projects will fail it gives you freedom to try stuff that you would never have tried otherwise. Because your career's not on a line right. You're not thinking if I fail on this project Dania's going to call me in to her office and whatever versus being [inaudible] saying yep the project failed.	The Human Resources Director in one of the lab hotels describing the quality of his General Manager in terms of creating a workplace where people can experiment and are not afraid of failing if they try to succeed.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:32:04 AM	I would just say just from the observations in being new to the property, we're not afraid of failing. I think we're just open to the new ideas, thinking outside the box and really identifying the needs of our guests, learning from it and moving on. We don't really see it as a failure. It's just a continuation of this learning process that we have in involving ourselves in the whole evolution of this product, this new lab.	A good comment from a leadership committee member at one of the lab hotels, where they see failure as part of their day-to-day learning.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:49:54 PM	I'm looking for someone that has failed before. If you this is one of my questions. If you don't if you tell me you've never failed first of all you're lying. Or, you just don't take feedback and you blame others. So I like to hire people that have given it their all in something and have failed miserably. Then we have a discussion about why did you fail. What did you learn? What have you done differently? How did that help you to succeed? So we have this conversation during interviews because I need somebody that the innovation process and the learning process will include failure.	The Human Resources Director of one of the lab hotels explaining how they started assessing candidates' willingness to experiment and fail.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:32:37 AM	If things work or they don't work, then you try it a different way. I don't think it's really seen as failure. It's just like we try.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:09:41 AM	If you're going to fail, fail fast. It doesn't take a year to fail. Right? You don't need to spend thousands of dollars to try a new idea. Tell the people you know, you tell your guests we're trying something new that's why it looks cheap. And ask. You just ask your question. I think it's been a very rewarding experience.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Importance of recognizing that failure is good, and that failing early is better.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:32:51 AM	It's a learning experience.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/11/2012 2:39:04 AM	Looking at one thing that we implemented -- and it actually failed but it failed for good reason, it had nothing to do with leadership. It's still going on but it's not in the same form. We had an "I forgot bar," which we built and put up and it just got ransacked every day. We pulled it out of the lobby but we still haven't given up on that idea, and I think that's important from a leadership standpoint to, you know, especially being a lab Project X hotel to keep thinking of ideas, of ways to make it work and keep trying, not giving up. I guess, even if it's not the same idea that you had to begin with, working around the process and making it work somehow.	An example where the acceptance of failure lead to new learning.
Impact of Leaders	Leadership skills	Experimentation/Failure	Skills conducive to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:19:39 AM	One of the examples I'll give you to back this notion up is that throughout the Lab hotels there were conversations about too many brand standards were tying our employees up to a certain script, this and that. One of our senior leaders in Hong Kong said, oh no, we cannot get rid of these. We cannot break the standards, we cannot change the scripts, and people need to be told what to do, how to eat, how to walk and how to talk.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:53:33 AM	When we said, well allow them to work on their own, we heard back, oh, I'm scared, this isn't going to work.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:53:03 AM	Robert:I'd say a combination of both. I think our, my managers made it a point to say, "Okay. It didn't work, so what next?" And corporate. I mean, corporate in a hundred percent behind, you know, "Some things are going to fail, we just have to keep trucking and that's what we can do to make it work."	Supporting experimentation should come from all levels, as this focus group participants describes his experience.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:53:03 AM	Robert:We put slippers -- well, socks in women's rooms for a couple of months to see - with a note saying "please wear them while you're here" type thing, and sandals. That was one of the initial things that we did. That was a great failure.	Another example of not being afraid of failing.
Impact of Leaders	Leadership skills	Experimentation/Failure	Importance of recognizing that failure is good, and that failing early is better.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:08:30 AM	Yes:How do you know it was a failure? Robert:Because no one used it. We initially did it and people just took it, and that wasn't our idea, to give them a free pair of sandals. It was more to, "Please wear around your room, or take a shower with," or those sorts of things, so after we realized we were going through a lot of money doing that, we put a card in there saying they could be purchased -- wear them around the room and if you'd like to purchase them, you know, we can make that happen. And nobody used them, so -- even, we surveyed some of the guests and their feedback was beneficial for our failure.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Importance of recognizing that failure is good, and that failing early is better.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:08:30 AM	So before we knew this process, there were no empathy interviews. There was no ideation. We basically just came up with what we thought would be the best way to accommodate that. We put together and spent a lot of money, a lot of effort in putting together this bar in the lobby that just allowed people to come and take things. We found out after about four or five days that that was a disaster because it wasn't really serving the needs of what we were trying to accomplish. It was just becoming a free fall.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:20:26 PM	So recognizing that something wasn't working and utilizing the fail and fail fast was part of the leadership in this instance with Dave and Todd recognized, this is not going to work for this hotel.	The Human Resources Director of a lab hotel explains the importance of fostering this skill of experimentation in leaders.
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:19:54 AM	Yes:Do you think this is a skill that our leaders have to learn to be able to stop a project when they see it's not going to work and to fail and fail early and move not other next one? Marco:Absolutely. I think that's the whole mentality that we're trying to instill in folks through this innovation process is it doesn't have to be successful in the first go around. With our Act team, it's exactly what we're telling them. Look, prototype some ideas of some things that you want to focus on.	
Impact of Leaders	Leadership skills	Experimentation/Failure	Not afraid of failing, committing to prototyping	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:19:54 AM	We develop prototypes and we test and sometimes we have to go through the cycle six, seven, or eight times to figure out if there's something there and guess what? Sometimes things don't work. Dave, I think will talk about some of those particularly here at the O'Hare lab and that's just as important. Mark and others will say that failure has to happen through this process because if we don't fail, we're not trying hard enough. The key from failure is to learn from it, to take what we learned and apply it to the next thing. If we're gonna fail, let's start failing fast without spending a lot of money, so that's part of it too to kind of go through this cycle quickly.	The case study organisation's Chief Innovation Officer on failing.
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/29/2012 7:39:27 PM	And frankly and I know it must be funny coming from me, but I also think there's -- it's one of our values, but I truly think there needs to be a level of humility of while we're excited about this and while I want to look external, while I'm getting authority and delegation and we get to experiment and what we could do, could it impact for the whole global xxx a level of humility around.	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:29:16 PM	I think at the end of the day, he's very pro-employee. I mean that in a good way. He's very used to drive me crazy when I was an exec house keeper because he smoked. He would always find out everything before I did, because he smoked with them.	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 17:36:06 AM	Right, but if you have people walking around at xxx thinking, I'm only a small officer here who is holding the reins and whether I like yellow or blue, it doesn't matter, if my employees don't like it, if the city I'm in hates yellow then I'm not going to put it. If you start thinking that way, that's empathy but unfortunately we tend to sometimes think, hey what's my title, what's my name? This is how organizations don't do well, become the roman empire.	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 17:16:34 AM	Right. They have humility. They are very humble, both of them and they are not scared to learn. This is a big thing. If you are always wanting to learn and get better if you never think you have arrived then that's contagious to your people.	

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:47:21 AM	So I think there's that fine line of while still be respectful to the individual and valuing them and having integrity in how we deal with people, not tying that same level of respect to stuff, hotel design, amenities, process, what people wear, blah, blah, blah, that we can be openly questioning of that and saying those are things that we can actually change without kind of disrespecting the individuals that might have come up with it in the first place.	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:29:58 PM	Talk to the common man. I don't know. He's not so formalized that he can't talk to a bellman or housekeeper, whatever the case may be.	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 1 2012	11/20/2012 7:14:34 AM	To me, he brought into xxx a thing saying: yeah, I never once heard him say, you at xxx you people don't - no no no, you're not cutting the mustard here. Never. He's always said, wow great things but let's even get better. This is one good thing about a leader that came from outside that never knocked xxx because a lot of people I have seen over my career coming from outside, didn't do well because they started wanting to get busy telling us what works for them without taking into consideration -	
Impact of Leaders	Leadership skills	Humility	Remain humble ...	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:28:03 AM	Well, even with all that and that big guy on campus and not the one who everyone's looking at and I have to be in the spotlight type of thing. It could be tough to manage if you like the spotlight already and you've been given a bigger spotlight with this project. So I think they undergird it with that single one of our value, the idea of humility because we hey, as a GM, I don't know everything, I don't know where I should be looking for all the innovations, I don't know where it will end so I have a sense of humility about the whole thing at the same time.	
Impact of Leaders	Leadership skills	Influencing	The ability to bring others to one's way of thinking without force.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:09:00 AM	I give her a lot of credit because she's dealing with people with a lot of tenure in the industry you know, old dogs and new tricks. It takes a lot of convincing but I think she did a fantastic job of making sure she was inclusive.	
Impact of Leaders	Leadership skills	Influencing	The ability to bring others to one's way of thinking without force.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:11:33 PM	I'm not seeing it. If anything I think we have to self-promote with in the hotel. There are certain areas that really are not sure of some of what we do or what we're doing is out there. I would say for food and beverage we haven't even tapped into food and beverage. That's exciting for myself because being new to it I find it very interesting that we're going to be able to do this here and thinking of what's the next step up for the food and beverage perspective.	
Impact of Leaders	Leadership skills	Influencing	The ability to bring others to one's way of thinking without force.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:01:19 PM	Not only was she selling me in the process right? But she also allowed me to get the answers on my own. She says you know what I'll train you on how to get guest feedback. And you go get some. And we'll see. And I did. So she what she did was open me up to at least entertain the idea. And I started to talk to guests and other employees you know, they loved it. And I looked at beanbag and I was like oh that's horrible and I talked to a guest and they went like that is so creative it is fantastic. And I went like really? Great. And she definitely convinced me so it again it wasn't imposed on me. She took a very measured approach and just kind of got me there.	
Impact of Leaders	Leadership skills	Influencing	The ability to bring others to one's way of thinking without force.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:10:23 AM	Yeah. I'm telling you to do it. But she did not choose that route. She chose a route of I'll convince you, I'll show you intellectually first the need for it. Then we'll show you the benefit. By the way, you're going to be developed on learning new things. And the results have been I mean, I'm a convert. You asked me earlier have you been xxxix I drank the Kool Aid of the lab hotel. I'm all in.	
Impact of Leaders	Leadership skills	Influencing	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:10:23 AM	Yeah. I'm telling you to do it. But she did not choose that route. She chose a route of I'll convince you, I'll show you intellectually first the need for it. Then we'll show you the benefit. By the way, you're going to be developed on learning new things. And the results have been I mean, I'm a convert. You asked me earlier have you been xxxix I drank the Kool Aid of the lab hotel. I'm all in.	
Impact of Leaders	Leadership skills	Innovative	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/12/2012 7:46:18 AM	No, I would say an innovation process. The technical piece of the job, if they're not performing that, the competency has to be there for that. It's the innovative part. It's the engagement piece. It's all of those things that are so hard to teach someone. It's usually an inherent characteristic that somebody has that we try to identify.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:05:32 PM	Again we learn from our failure there but I think that's part of it. I think that's exactly what we're talking about. If you don't learn from it -	Failing alone is not good enough, one also has to learn from the failure.
Impact of Leaders	Leadership skills	Learning agility	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/9/2012 7:49:07 AM	And I think part of that is to do that, I love to learn, so it's a perfect topic, right? I am a learner by nature, and I love to learn more. How does this work? Right? Tell me how that might work. Tell me how that might be different. Why would that be different? And you have to want to understand, right? You have to want to have a curious nature to understand how things are different. It was along the lines of collaboration, but collaboration means we're working together, but this is really - you have to want to know more and learn more and understand that it's very different somewhere else, and there's no right way to do things, right?	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:59:44 PM	But on the other hand she also allows you to teach her. There are things that she doesn't know and she's very open about it. She's not one of these managers that thinks oh I need to know it all. She'll actually come in and say that's intriguing tell me more.	Describing the openness to learning by one of the General Managers.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:27:38 AM	He's done it by first learning himself and then by him teaching others and co-facilitator and picking up the ex-room attendant Raquelle who is now the coordinator and involving her and taking her feedback and putting in place. He's done a fantastic job.	An example of a Housekeeping Manager who successfully transferred his learned knowledge on to his own employees.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 1 2012	11/20/2012 7:29:55 AM	How do you feel it's your own business? That's the big question. How do you make people really believe that it's their business. One, you have to back up what you say with your actions, two you have to train and hold hands and nurture and three, give in a environment where people learn. Four, if they make a mistake, don't hit them with a two by four.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 1 2012	11/1/2012 7:21:47 AM	I find that leaders that try to be controlling, that are not open to other ideas are not strong leaders because what they are doing is they are making the organization the same again and again.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:41:45 PM	I have grown so much in such a short time and I look back and I knew - you know coming into the job I said to myself, "God this is such a great opportunity for me to reinvent myself the way that I want to, be the leader I want to be. Change things about myself. It's a clean slate." So I came into this already with that mindset and although not really saying, "I'm not gonna do this," or, "I'm not gonna do that." It wasn't really premeditated but it was just more of a frame of mind right.	One of the lab hotel General Managers realizing how important continuous learning was and is in her role.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 1 2012	11/20/2012 7:15:40 AM	I like what I saw with Michael Gray at the Churchill. The way as an old Hotelier, and old not like "old", but old as in many many years under his belt who is a true Hotelier, very professional. To me kind of buttoned up, right to see him embrace this and the joy out of it was amazing. To me he's the hero of the lab hotels.	And although learning new things may not have come naturally to everybody, here is another example of a successful General Manager in one of the lab hotels in London.
Impact of Leaders	Leadership skills	Learning agility	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:36:20 PM	I see the strong leadership skills of our collaboration, curiosity, flexibility, listening, consensus building.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 1 2012	11/20/2012 7:16:53 AM	I think both of them have that as they are both well-established people that have been with xxx for a long time but they are not afraid to one, listen and two say, I didn't know everything. That, this is good, this is going to make me better. This is the one skill set for the two of them that I was very very impressed with.	Being a learner also means being able to admit that one cannot know everything.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:48:29 AM	I think it's a personality. Rachel talked earlier about being positive and that being one of the ways that those that are good department heads in this implementation process are able to get other people on board. So I think in the selection process it's more about selecting people who are unwilling to settle for complacency, you know, unwilling to plateau and to constantly try to innovate and reach that new height. That's where competition is.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:21:31 AM	I think it's just different. You know, it's really comforting to do something and be done with it and say, I'm done," you know, "It's complete." But with Project X it's never complete.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:46:52 PM	I think the old dog's going to have to learn new tricks in order to move forward with the company because this is obviously the direction and it works. It's working for us.	And learning agility will become a core skill for leaders in the future, as the organisation keeps on transforming itself.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/11/2012 5:22:21 PM	I think what they struggled with was understanding the process. Then as they saw what the process was, and this was me included, when we were first presented with the whole design thinking phenomenon, we didn't quite get it. It took us a couple of times to truly then understand. I don't know that we fully understand it. I can tell you, Yves, what it made us was very excited about the whole process. I think what made excited about it was we were learning something new and we were learning how to do it at something differently.	The rewarding side of learning something new.

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 7 - Mark Hoptlamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:27:40 AM	I was just going to build on that. So one experience that I've had directly, I took my direct reports, my team. We went out to California, we spent a few days in Santa Clara and also one morning when we sort of dispersed and went to interview some of our colleagues in different hotels around the San Francisco area but also some guests. We started off at the Grand xxx in San Francisco and this guy actually is directly responsible for the process by which the team at the Grand xxx San Francisco is ending up with a completely unique front desk design. So I just wanna share the - I'll try to keep it short but this is unbelievable to me because I learned a huge amount through this.	The CEO of the company explaining during a town hall meeting what kind of learning has taken place for him.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:11:46 PM	It's a constant learning. It's a cycle that's constant.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/11/2012 5:24:15 PM	My takeaway from this was, and this is what I've learned, the whole design thinking process while I've always considered any hotel that I've been in a Lab hotel because we always try new things and we're always, I think we should always continue to learn and take what we do to the next level and also implement new innovative things moving forward that basically benefit our owners, our guests and our employees.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:08:47 AM	So I wasn't till after we went and learned this whole process of empathy to figure out that that's not really what they were looking for. They weren't looking for to loot. They were still just meeting this need to get something privately. So we started having these empathy interviews with customers and trying to figure out what would work better. That's when we started to learn that really all they wanted was some sort of unobtrusive way to get what they wanted.	Another story about a manager's ability to listen, learn and act on it.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:29:45 AM	So, yeah. I think it can be taught. I think we're all learning. That's probably the most eye opening thing in this whole Project X for us is that's the take home. You have to think. You have to redo the way you think through processes.	
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:38:39 PM	The difference I see is that Cody's still learning and developing. He has those characteristics. He doesn't know it yet. He's learning. He's getting it. Pedro has then has had them used them. And then they've been in the cave dormant for a while right and now I've like woken up the sleeping bear right.	Outlining 'learning' as one of the key qualities and skills of a successful lab leader at one of the lab hotels.
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:27:49 AM	Well, it's especially, like HotSauce and when I came in and there was free WiFi in the rooms, things like that - I was blown away by HotSauce. I think that's cool because I was used to I Tenant, so I learned that system and everything like that. So when I saw HotSauce and all the capabilities that it had, I saw, you know, there were so many more things that you can do with that in the respect of catering to the guest, the banquet side - like, any of our respective departments, if it's internet-based anyone can get on it on any handheld. I mean, it really makes it pretty interactive. Learning those things, I definitely - my management style probably hasn't changed but my learning curve has changed. So just I would say on any given day, especially here, I'm learning probably ten times as much as what I was learning at the other property. Yeah, I would say that.	Learning new things every day
Impact of Leaders	Leadership skills	Learning agility	Willing and able to learn	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 6:49:22 PM	What I'm looking for when I'm interviewing for a manager is somebody that can take feedback and take it well that reacts well to somebody telling them of an area when they need to improve.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:15:03 AM	I like his leadership style, one of listening and not knocking ideas even if an idea is silly, even if someone raises his hand and speaks just for the sake of speaking. I think there is that nurturing thing that he brings in and people need nurturing. People at all levels need nurturing. That's one good thing.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 7 - Mark Hoptlamazian and Jeff Semenchuk - Aug 2 2012	11/4/2012 4:50:10 PM	A long time mentor and friend of mine recently reminded me that there's a reason we have two ears and one mouth and that is you're supposed to listen twice as much as you talk and actually that is the key lesson in how we're approaching, performing better, and being the most preferred brands in the marketplace. That is to say that we are taking a very refreshing approach to really making sure that we understand what's going on with our guests and figuring out how to go about serving them. This is not a passive thing. You have to be actively engaged and listening very, very intensively and making sure to take what you've heard and translate that into something you can take forward and take action around.	The CEO of the case study organisation on the importance of leaders being able to listen.
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:17:13 AM	Correct. I'm not convinced that at higher levels that the opened mindedness is there.	
Impact of Leaders	Leadership skills	Listening	Skills conducing to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1- Christy Sinnott - July 17 2012	10/10/2012 4:36:20 PM	I see the strong leadership skills of our collaboration, curiosity, flexibility, listening, consensus building.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:16:50 AM	I think both of them have that as they are both well-established people that have been with xxx for a long time but they are not afraid to one, listen and two say, I didn't know that, this is good, this is going to make me better. This is the one skill set for the two of them that I was very very impressed with.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:10:06 AM	I think it was very eye-opening to us that even though we've been in the business for 20 years or 25 or whatever it is, we don't know all the answers. It's important to listen what the customer says and feels and thinks.	A focus group participant stating the importance of listening to others
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 7 - Mark Hoptlamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:22:58 AM	I thought - I obviously didn't know women as well as I thought but that's another story. I was at a meeting and there was one of our colleagues there that talked about the fact that if they didn't have a toothbrush with them, they would not call the guest request line. They would go downstairs, even go outside under the street to a gift shop to get a toothbrush because they felt uncomfortable calling and they felt uncomfortable with somebody delivering it to the room. I could not believe this. I could not believe this was true because I've always known that when you forget something you call and they bring it to you and I have no trouble with that.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 7 - Mark Hoptlamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:30:07 AM	If you make it crude and say, "You know, we're just experimenting with this." And you can tell this is just a mockup then people say, "Okay, well I guess they're really looking for my feedback." And then they actually bring great feedback. Now you have to listen again two to one ratio. You have to listen very intensively and they came up with a completely unique design, it's really cool actually.	Listening to customers and employees is crucial.
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 4 - Pedro Irtzary - July 20 2012	10/24/2012 7:00:19 PM	Not only doesn't she listen to it you can see that she absorbs it. And it comes up another time and in a practical use so you can see how oh my feedback got used or she teaches and she learns at the same time.	Listening qualities of one of the lab hotel General Managers.
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:50:24 PM	So there was this amazing - like everybody in the hotel, the employee base was like, "Oh my God they listened to us. We got Dr. Pepper back. We got KESO back." but it's now a homemade from scratch KESO instead of the big block of cheese you melt or the can of cheese you melt right with all of the preservatives in it. And we got the radios repaired. So that created this new level of trust very, very quickly okay.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:25:43 AM	They people who the care about, they go out there and give you things that make you feel like you're on top of your world. That's one thing that I learned. The biggest thing for me that came out of lab is listening to your customer and to me our customers are not only the paying guests.	Importance of listening to all customers - internal and external.
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/25/2012 7:14:21 AM	They were open to comment or collaboration, willing and able to be in a group where they could listen and they could hear everyone's ideas and be very respectful and build on those ideas.	Listening also fosters collaboration, which is another key leadership skill
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:42:28 AM	To listen and not have the right answer all the time, exactly.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:14:29 AM	To me, he brought into xxx a thing saying, yeah, I never once heard him say, you at xxx you people don't - no no no, you're not cutting the mustard here. Never. He's always said, wow great things but let's even get better.	
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:00:04 PM	What I learned is to listen more and do less leading. When I was giving feedback from the guests I would take what they were saying and I would interpret it how I thought what they meant and I would repeat it back to them. Oh, so you mean this by this and the person would say no, that's not what I mean. I was trying to lead down a certain path that I thought that the guest was going and that's not what they were trying to say and I was using too many leading words to move the conversation, to move us to the end point. I needed to learn to just stop and ask. I still needed to ask them questions, but not to do leading questions and just take what they were saying and not assume my own things.	Listening and listening is not always the same. In this example by one of the leadership committee members of a lab hotels, he describes how empathetic listening and asking better questions leads to superior results.
Impact of Leaders	Leadership skills	Listening	Be a good listener, and listen before acting.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:27:40 PM	Yves Givel: So what do you think are Dave's top three qualities? Why is he so successful? Kelly Toboja: He listens to our employees. Yves Givel: He's a good listener.	Top qualities of a successful lab hotel leader

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Loyalty	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:39:35 AM	I believe also we expect loyalty because we are loyal and that's unrealistic. When people leave we get very upset and we get – I don't want to say vindictive, but we don't take well on people leaving or not supporting us. It should really be encouraged.	
Impact of Leaders	Leadership skills	Multi-tasking	Multi-tasking	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:03:34 PM	Because you want to concentrate on the innovation stuff, but there's still the guests that need to speak to you out front and I don't have time for you. I'm innovating. I can't do that.	
Impact of Leaders	Leadership skills	Multi-tasking	Multi-tasking	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:03:01 PM	I would say someone that can manage their time and juggle projects. I mean a lot of the beta testing innovation stuff is time consuming. It's like a day job being able to embrace these experiments and still get your regular work done. When we first started we were averaging 25-30 hours a week, some of us on this project X. That's difficult if you can't juggle several balls at once.	
Impact of Leaders	Leadership skills	Multi-tasking	Multi-tasking	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:04:23 PM	So being able to adapt to that and survive and still lead your team and do a good job and worry about your customer service scores and your engagement scores and everything else that comes along with it, if you can make it here, then you're good to go.	
Impact of Leaders	Leadership skills	Openness, open-minded	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:35:51 PM	And so again because we've had really good collaboration, it's because you've really been able to – you know, I have learned from you to say, "Hey, this is how we do it different, right? This is how we opened this hotel very successful with many fewer people in Mexico City than we will go and send to Green Bay in Wisconsin, right?" So why can't we learn from that and say, "Well, what are they doing different there that we can apply here?" You have to want to be able to be open and understand. That's probably almost first and foremost, and then collaboration being the second part of that.	
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:38:46 PM	For me, it would weigh heavily on the side of being a leader in the hotel in a lab environment and within the hotel as a leader to managers, not necessarily just because of the lab. The technical side, I would leave that up to my general manager. I'm trying to get a feel for the person, how they're going to treat the employees, their openness to change from whatever situation they were in from their previous hotel to this hotel. That's the most important thing to me.	An important factor when interviewing candidates.
Impact of Leaders	Leadership skills	Openness, open-minded	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Document Analysis\Internal communication\Message from the CEO - Oct 2012	10/10/2012 4:30:45 PM	I ask that as you carry out your responsibilities, you seek opportunities for further collaboration, coordination, openness to new ideas, efficiency and flexibility. Our behaviors – the empathy with which we listen to guests and colleagues, the speed with which we respond to change, our willingness to take informed risks and learn from our mistakes – are key factors that will ensure the success of our new organization and increase our ability to drive innovation, differentiation and preference during this exciting period of transformation at xxx.	Openness was also one of the qualities highlighted by the CEO.
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:21:37 AM	I find that leaders that try to be controlling, that are not open to other ideas are not strong leaders because what they are doing is they are making the organization the same again and again.	
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:17:25 AM	I think I got to him because he did turn a corner. He opened his mind a lot. To me that's an example of person we got to the point in this office where people were saying, wrong hotel, let's switch it.	Being open-minded and adapt.
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:50:03 AM	I think that the shift also – or not even the shift – but I think there also needs to be a huge amount of attention played to the creativity of a person, back to, like, a personal type thing because anybody, I think, with the innovation process anybody can be innovative. You just have to have an open mind and go with the flow – pardon me, I'm so sorry – go with the flow and be willing to take chances and have an open mind to it. So rather than just being focused on somebody else, you also have to focus on yourself and how you can do that, what you can do to make a difference, so kind of shifting a little bit.	Although this participant of the Middle Manager Focus Group believes it is an inherent characteristic, being open-minded is a quality in general.
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 4:01:49 PM	I think they need to be more open to other ideas and not just this is the way we've always done it. This way works, but can we also get to the same result by maybe doing it a different way. They have to be open to different ideas and foster those ideas with their people, get feedback from their people about different ways of doing things.	
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:31:53 AM	I would just say just from the observations in being new to the property, we're not afraid of failing. I think we're just open to the new ideas, thinking outside the box and really identifying the needs of our guests, learning from it and moving on. We don't really see it as a failure. It's just a continuation of this learning process that we have in involving ourselves in the whole evolution of this product, this new lab.	Being open-minded is a starting point for the innovation process.
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:34:26 AM	Showing enthusiasm, being involved. Getting people around them excited. Just generally being very pro trying something new. Very open.	
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:27:22 PM	That's a very good question. I think we always are trying to recruit people that have more than just the technical skills for a job on that's leadership skills and an openness. They may not be trained in this exact process but you need to be able to recognize that, yes, this is somebody that is open-minded and willing to learn new things. If you have somebody that's just going to be that problem solver, maybe you will take a look at a candidate that you think may be more open, that's a good question.	
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 1:47:54 PM	Yeah, I think characteristic wise, there's a deeper level of openness and less ownership of the existing stuff than others. And it's not a fake openness.	Authentic openness.
Impact of Leaders	Leadership skills	Openness, open-minded	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:36:26 AM	Yes GivelDo you think a leader has to be innovative to be able to follow that process and get it going at a hotel. Siobhan Sarsfield I think they have to be open to it. At least open to the suggestion and that makes it a lot easier for us to be open to it and embrace it as well. Otherwise how can you look at it in a positive manner or be adaptable to it?	
Impact of Leaders	Leadership skills	Organization savvy	Knowing the community	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:26:54 AM	– that the leader – I think the chief innovation officer is an amazing individual, but when you look at our company and our culture, it's a very tight knit community and it works in a very certain way. I think he is not aware of it and the people that he has surrounded himself with, were not necessarily the most organized themselves.	
Impact of Leaders	Leadership skills	Organization savvy	Knowing the community	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:28:04 AM	Yeah, I think that the senior leaders need to understand what the vision and the purpose is and they need to be informed about what is happening. They don't necessarily be – need to be engaged and asked for their opinion at all time, but they should know, wow, there's a meeting there, this is happening, this is what we're doing. And that – in that particular, wasn't really handled very well.	
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 7 - Mark Hozlamazian and Jeff Semenchuk - Aug 2 2012	11/5/2012 7:28:35 AM	I think from an employee perspective, there had been many employees that have been really involved in some of the processes and will be continued to be involved in processes as we move forward. We got a new project coming up in housekeeping that I'm excited about and it's involving the employees and getting their ideas and opinions about what's going to make their lives easier to take care of our customers.	The importance of involving others in the process, and let them participate.
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:37:39 PM	We had all of the corporate brass here. And we were very busy in the hotel too, sold out, with other things going on. And so Cody came in on the Friday of that LAB launch week and he brought in his entire department to the kickoff meeting. And you could just see him when we started talking about the LAB and we're now a LAB hotel and so on and so forth and he was just so proud. And what was really cool about it for me was that of everybody in the audience it was so obvious that he had been talking to his group because they were all really like fixed on the conversation and they were really engaged and interested.	An example of where the Housekeeping Manager of one of the lab hotels fostered real participation and involvement.
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 4 - Pedro Intizarry - July 20 2012	10/24/2012 7:25:52 AM	And every quarter we give a manager the prize. There's two managers that did the best example is a Cody Gleason. Cody is our executive housekeeper. He has done fantastic job of having his team involved. Having his team informed. Having them give him ideas. He was in charge of a few projects.	
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:32:26 PM	And so part of that discussion before we roll that out is understanding if I'm a dishwasher or I'm a cook well what does the LAB mean to me and how can I be part of the LAB. And I wanted to make it really crystal clear to everybody that the LAB's not happening over here that it's part of who we are, it's part of their opportunity within the hotel to get involved in a bigger way. That we want their input and that it's not gonna fall on deaf ears. That they're able to express themselves freely, that we're listening, we're responding and we're actually making things happen as a result. And again it's just building that trust.	
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/3/2012 6:54:13 AM	And we're getting employees involved in the process where we missed that entire step before. So from my standpoint as HR director, I'm really excited about that.	The big change - getting others involved and let them participate.
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:23:51 AM	Mind you, not everything they thought of has been a home run, but the employees have been liberated. This is a big thing.	

Coding Summary By Node Extract

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/11/2012 5:20:26 PM	Our desk agents thought, "We already had a preconceived notion about what we wanted and we were being clever about trying to talk them into it." They were very nervous. Then when they found out no, you're the one who's gonna design this desk based on this new way of checking people in because we want to check in this way -	Success story - design of a check-in desk by receptionists.
Impact of Leaders	Leadership skills	Participation and involvement	Foster employee involvement and participation.	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/3/2012 6:55:58 AM	We initially started with the engagement survey questions and asked them to select a couple questions that were important to them and we sent our invitations to close to 80 different associates, probably had 50 at the first meeting and we selected supplies. They selected supplies and they selected my supervisor cares. And then we began to brainstorm and it's really neat to see this process unfold and how it's really impacted the employees because they really feel like they have ownership in the whole process.	Participation and involvement fosters ownership and accountability
Impact of Leaders	Leadership skills	Passion	Natural ability to try something new, and give your full heart to the cause.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:39:25 PM	Is having this experience where - and I can tell you story after story of - I could give you names of people you could go out right now and talk to and they will tell you the story about how they've been in their job at xxx for two years or five years or ten years or fifteen years and you know they were happy, they were doing okay, they're happy, they were bumping along right, doing their job. And then by them being invited or included in a LAB meeting or - you know because I've just been trying to kind of pull in people right. It's like, "Oh come on, join."	
Impact of Leaders	Leadership skills	Passion	They know the innovation by design process, which makes them successful	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:29:13 PM	No, because hopefully within xxx we grow our own so the earlier you can get to folks that are upwardly mobile and you recognize that they're going to be leaders of the future regardless if their middle man or lead employees, have to explain that process to them. I mean when we had our employees in the room when we explained the process to them, we received a lot of positive feedback. You mean my opinion counts? You want us to help you coming up with solutions? Absolutely. So it's down to the employee level for the employees that are driven and interested in that sort of thing. I mean you're going to have some associated and supervisors to a certain degree that are not interested in learning that way of thinking.	
Impact of Leaders	Leadership skills	Passion	Natural ability to try something new, and give your full heart to the cause.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:34:45 AM	Showing enthusiasm, being involved. Getting people around them excited. Just generally being very pro trying something new. Very open.	
Impact of Leaders	Leadership skills	Passion	Natural ability to try something new, and give your full heart to the cause.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:39:02 PM	So seeing Pedro get excited about the fact that he now can really put his talents to use you know had really been special. And I need to get a tissue. So I think that's been the most satisfying for me personally.	
Impact of Leaders	Leadership skills	Passion	Natural ability to try something new, and give your full heart to the cause.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 7:54:23 PM	To me, the first thing that pops into my mind is these folks have demonstrated a passion for it and an ability to, I would say, somewhat of a natural ability to dive into something new and not be afraid of what the result is and understanding. Passion was the first thing that popped into my head.	
Impact of Leaders	Leadership skills	Pragmatism	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:24:57 AM	The big challenge I have with the lab hotel and the innovation process is that the people involved in it are very creative people, they're not very structured, so meeting [inaudible] and for follow-up meetings that we have done, we're organized and we were not really aware of what was going on.	
Impact of Leaders	Leadership skills	Problem solving	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/18/2012 11:28:24 AM	We are problem solvers by nature. That's what we do. We put out fires. We make decisions quickly and there's a time and a place for that; for something like that, probably not the right	
Impact of Leaders	Leadership skills	Process	Natural ability to try something new, and give your full heart to the cause.	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:48:19 AM	I think it's a personality. Rachel talked earlier about being positive and that being one of the ways that those that are good department heads in this implementation process are able to get other people on board. So I think in the selection process it's more about selecting people who are unwilling to settle for complacency, you know, unwilling to plateau and to constantly try to innovate and reach that new height. That's where competition is.	
Impact of Leaders	Leadership skills	Process	They know the innovation by design process, which makes them successful	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:29:35 AM	The other is that they know the process really well because they're responsible for literally the process and the steps and so when the ones I've seen, at least last week, basically because almost all of them were together, the ones naming where they are in the process and knowing what step needs to occur next and knowing about how long they think that will take and what occurs after has a process, he has that sound, they in charge of the process.	
Impact of Leaders	Leadership skills	Process	They know the innovation by design process, which makes them successful	Internals\Interviews\Individual\Interview 7 - Mark Hoplamazian and Jeff Semenchuk - Aug 2 2012	11/4/2012 4:54:09 PM	The other thing that I've learned over the years is that it really does take a process. Mark was mentioning this innovation process or approach, some people call it designed thinking. Some people call it human centered design but it really is a different way of thinking and for those of us who have for many, many years come out of a mode of operations, of solving problems, of everything working like clockwork.	
Impact of Leaders	Leadership skills	Process	They know the innovation by design process, which makes them successful	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:17:25 AM	What I think Jeff is bringing in with this prototyping and the school of design from Stanford and this and that is making your brain work and making you look at things in different - it's exciting. I mean the first time I sat through this in Santa Clara I was jazzed up, but I was excited.	
Impact of Leaders	Leadership skills	Process	They know the innovation by design process, which makes them successful	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 1:45:40 PM	Yes:Do you think the No. 2s are in the future a stronger driver than our GMs? Mark:Probably. I think so partly because they've got both the combination of mindset, behavior, philosophical kind of godfather leader and they've done the work where they've managed the teams that have done work, where they've measured the output and they're more kind of in the trenches so I do think future, looking forward, they'll be bigger drivers of it than our current GMs that are going through it will be.	
Impact of Leaders	Leadership skills	Respect	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:56:42 PM	Not one word. He called them into a meeting one morning. They flew in, which was normal fare. He sat them down and said, "We're going to change. Your job changes now. Effectively, your job is different. Here's your new job. And in order to make this change happen, I'm stripping you of your staff, right, and here's how the work is going to get done." And he handed them a list of his employees and said, "Here's what happens to everybody that works for you. You need to get on your plane tonight, and tomorrow you're going to have these conversations with these people."	
Impact of Leaders	Leadership skills	Respect	Respect each other and each others differences.	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:48:03 AM	So I think there's that fine line of while still be respectful to the individual and valuing them and having integrity in how we deal with people, not trying that same level of respect to stuff, hotel design, amenities, process, what people wear, blah, blah, blah, that we can be openly questioning of that and saying those are things that we can actually change without kind of disrespecting the individuals that might have come up with it in the first place. So I think in my opinion we are very respectful culture and I think because of that sometimes things that we should say no to we don't or at least we don't early enough and we let it get really far down because we don't want to offend somebody because we're being respectful versus you can do that without offending somebody. We just have to be more comfortable in doing that so that's one I think.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 1:40:27 PM	He has to be the one, exactly. He has to be the visible leader, kind of intellectual head of it, maybe doesn't have to lead the initiative now so I'd draw a distinction there.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:29:45 AM	How do you feel it's your own business? That's the big question. How do you make people really believe that it's their business. One, you have to back up what you say with your actions, two you have to train and hold hands and nurture and three, give in an environment where people learn. Four, if they make a mistake, don't hit them with a two by four.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:28:51 PM	I think at the end of the day, he's very pro-employee. I mean that in a good way. He's very. It used to drive me crazy when I was an exec house keeper because he smoked. He would always find out everything before I did, because he smoked with them.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:17:05 AM	I think both of them have that as they are both well-established people that have been with xxx for a long time but they are not afraid to open, listen and two say, I didn't know that, this is good, this is going to make me better. This is the one skill set for the two of them that I was very very impressed with.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/28/2012 1:39:40 PM	The GM definitely has to be involved in it. I think leaving from a mindset and a role model behavior, absolutely. But I also think there might be an opportunity for individuals who are kind of in the executive committee or the managing committee level to be the true leader of the initiatives, but in terms of the kind of philosophical leader, then I think it's definitely the GM. Just like we'd in a corporation, the CEO needs to be the one.	
Impact of Leaders	Leadership skills	Role Model	Lead from the front	Internals\Interviews\Individual\Interview 10 - Marco Kennedy - Oct 5 2012	11/4/2012 4:43:09 PM	You have to have the support from the GM. If the GM didn't believe in it and Todd's running all these prototypes and tests and getting analytics and it isn't necessarily monitoring the front desk, it has to come from the top.	

Hierarchy 1	Hierarchy 2	Hierarchy 3	Description	Hierarchical Name	Modified On	Coded Text	Narrative
Impact of Leaders	Leadership skills	Strategic	Long term view, able to see the big picture	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:29:19 AM	There's more shine outs than I think struggle, but there's some of both. In terms of the No. 2s who I think and the kind of skills they have and the characteristics they have that help them shine, one is I think they've got a long-term view so they're not freaking out about what this is gonna mean in the short term and that means we're gonna have a little bit of chaos and unfamiliarity and people won't know what to do in the short term so I think that we've got the longer term view in a sense kind of a patience and there's it's not a go with the flow if they've got a good even keel about them so that's one.	
Impact of Leaders	Leadership skills	Technology savvy	Know your systems, and how they support your processes	Internals\Interviews\Individual\Interview 6 - Mark Demich - Aug 14 2012	10/30/2012 7:49:53 AM	And someone at xxx who was checking the tweeter feeds and everything found it, called the Grand xxx New York, said get up to his room, they sent two engineers up, fixed the thermostat and the air conditioning and the TV within about 20 minutes of his tweet and so then he tweeted back going amazing response, I didn't even tell them, blah, blah, blah so in a way, that goes back to your basics. We could have given him the coolest, best experience possible, the neatest room, but the air conditioning didn't work and his TV didn't work so no matter what the experience we thought we were giving him, that kind of basic operational excellence didn't work for 20 minutes, so yeah.	
Impact of Leaders	Leadership skills	Technology savvy	Know your systems, and how they support your processes	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:54:50 PM	Because information is being delivered via technology, and is there another role perhaps for somebody that chooses not to embrace it? I don't know what that job is because even in North America, you would have to enter your payroll and your vacation days in the system. But I do think it has to be.	
Impact of Leaders	Leadership skills	Technology savvy	Know your systems, and how they support your processes	Internals\Interviews\Focus Groups\Focus Group Interview 1 - Middle Managers - July 23 2012	11/18/2012 10:46:40 AM	I'd say so. I mean, I know if a person doesn't know how to use e-mail, then they're not going to be very good at pretty much in any department, any department head decision.	
Impact of Leaders	Leadership skills	Transparency	Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:58:23 PM	And there's a certain transparency. I mean there was no hidden agenda.	
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:28:08 PM	Amanda Koehler: He's very straightforward. You know exactly where you stand with him. He's direct in a good way. He'll tell you like it is I think. I think I always know where I stand with him. There's no guessing.	Qualities of a successful lab hotel GM
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:29:45 PM	Charles Fusco: He's very genuine. He's a legend in Indianapolis because he was there for eight years because of that ability to just Kelly Tobago Connect.	Qualities of a successful lab hotel GM
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:22:47 AM	Even though this could be at times challenging to that leader, this the only way the organization will flourish. You don't want yes men and women around you as leader and the way you get there by not having yes men and women is by trusting people. I have always said people will surprise you.	Nicely said - let people surprise you.
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 4 - Pedro Irizarry - July 20 2012	10/24/2012 7:08:13 PM	I need to make sure that before I delegate I need to trust you 1000 percent. And it takes me a while to develop my team to the point that I say good you can take that. An area that I need to improve on this is fine. To expand that to an associate population that I don't work with every day that I know them very well but that doesn't mean that I work with them eight hours a day and to say to someone in housekeeping that I only talk to in the cafeteria I trust you with this project that's going to cost me \$1000 it was very hard for me. It was very hard for me. We had a project in the cafeteria where we put a whiteboard and we would ask employees questions.	
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:00:33 PM	In the process, the managers realized that this individual doesn't want to be that person below him because then they can tell him things and that wing man had to have the courage and the guts to tell the leader the bad news, the ugly news, whatever it is.	
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 4 - Dania Duke - July 20 2012	10/27/2012 4:50:20 PM	So there was this amazing - like everybody in the hotel, the employee base was like, "Oh my God they listened to us. We got Dr. Pepper back. We got KESO back." but it's now a homemade from scratch KESO instead of the big block of cheese you melt or the can of cheese you melt right with all of the preservatives in it. And we got the radios repaired. So that created this new level of trust very, very quickly okay.	Trust is important, and has influence on others participating and being involved in the process of innovation and experimenting.
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/2/2012 7:36:54 AM	Someone who has guts, who is very brave. Who is trusted by the disciples and the people below him because then they can tell him things and that wing man had to have the courage and the guts to tell the leader the bad news, the ugly news, whatever it is.	
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 5 - Dania Duke - July 20 2012	10/27/2012 4:32:46 PM	That we want their input and that it's not gonna fall on deaf ears. That they're able to express themselves freely, that we're listening, we're responding and we're actually making things happen as a result. And again it's just building that trust.	trust is the basis.
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 2 and 3 - David Nadelman and Nancy Morgan - July 19 2012	10/14/2012 8:02:04 PM	We realized it through all of the because we realized that we were going to this person and saying, "Here, this is kind of a leader at the front desk," and then in doing some of the empathy interviews and getting feedback from other associates realizing that they thought, "Hey, this is a good idea. Maybe we could try this." That other person not really relaying that information or representing that the other four people in this room think that this is a pretty good idea or that this has been a success or, "Hey, why don't we try it this way?"	
Impact of Leaders	Leadership skills	Trust	Be the 'go to' person that people trust and follow.	Internals\Interviews\Individual\Interview 8 - Joseph Khairallah - Sep 11 2012	11/1/2012 7:31:43 AM	Whether we adopt that or not, I'm not sure. That one, it was a big thing when it came to employee morale, then feeling good about themselves and two, it really cemented in the employees eyes the notion that that leader, that General Manager means business when it comes to innovation, not only lip services.	trust is the basis.
Impact of Leaders	Leadership skills	Visionary	Adapt or change your own style, adapt to a new situation or environment.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:43:26 AM	but more me a leader is somebody that has a vision, that spends a lot of time communicating that vision, double checking, always making sure that the expectations of the guests as well as the employees are somewhat at least understood, that if necessary evolves or fine tunes or changes the direction but they have a very clear vision of where they want to be.	
Impact of Leaders	Leadership skills	Visionary		Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:42:55 AM	I think a manager, they manage a day to day business and they really get involved hands on and they really get into the nuts and bolts of it. That's also a little bit the expectation that the senior leaders have of everybody within the organization, but more me a leader is somebody that has a vision, that spends a lot of time communicating that vision, double checking, always making sure that the expectations of the guests as well as the employees are somewhat at least understood, that if necessary evolves or fine tunes or changes the direction but they have a very clear vision of where they want to be.	
Impact of Leaders	Leadership skills		Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 1 - Christy Sinnott - July 17 2012	10/10/2012 4:58:08 PM	And he did not flinch and he executed a plan. It took about, I would say, a year until it was really fully ingrained of how things would be done. But he held steadfast to that plan and true to his word of what he had told people and what support he said he would give. And so he didn't flinch.	
Impact of Leaders	Leadership skills		Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Focus Groups\Focus Group Interview 2 - Senior Managers - July 23 2012	11/20/2012 6:13:57 PM	Todd Byms: I don't know. I'm serious. 10 o'clock one night an email comes out saying no more ties, got it. Yves Givel: Then one came that said ties again or what? Todd Byms: No. That was before. The rebirth of the no tie just came out at 10 o'clock at night one time. I had no idea what drove it.	
Impact of Leaders	Leadership skills		Skills conducting to the creation of the conditions and structures characteristic of a learning organisation.	Internals\Interviews\Individual\Interview 9 - Achim Lenders - Sep 12 2012	11/3/2012 6:41:00 AM	Yves Givel: If you look at some of your people in the field, and again I go back to leadership. If I look at your F&B specialists, your culinary specialists, do you think the profile will also shift as we go along? Achim Lenders: It has to. For me, right now we are good managers. We are not necessarily good leaders.	

Appendix 7:

Informed Consent Form (blank)

The attached document shows the blank template used to get informed consent from all interview and focus group participants. Signed forms from all participants are available upon request.

2 pages

[case study organisation]

(DATE)

(PARTICIPANT)

DATA PROTECTION/INFORMED CONSENT LETTER

Dear (PARTICIPANT),

Thank you very much for agreeing to take part in this research on '*Leadership in Learning Organizations*'. I greatly appreciate you giving up your time in order to help me. I am undertaking this project as a part of a Doctorate degree, which I am studying with the University of Leicester. The project I am working on is about the kind of leadership skills leaders at all levels in organization need to foster individual, group and organizational learning. You were selected to take part in this research because of your role as a leader in one of our 'Lab Hotels' in [case study organisation] where innovation and learning is a key strategy, or as a leader in the Corporate Office working closely with the innovation team.

You can withdraw from the study at any time if you feel that is necessary. If you are happy to take part in the research, however, I will ask you to sign a consent form giving your agreement. You can still withdraw from the research after signing the form.

The interview will last for approximately one (1) hour, and I will ask you a series of questions and will give you the opportunity to ask me any questions you may have. I would like to reassure you that the information which you provide in the course of the interview will be treated in the strictest of confidence. All data collected will be treated in accordance with ethical codes set out in the British Sociological Guidelines and any applicable Data Privacy laws. In addition, your answers will be unattributed to either yourself or to Hyatt as such.

The data gathered during the interview will only be used for my Doctorate thesis. Your own data will be completely anonymous and you will not be identifiable (i.e. the data will be aggregated, so that no individual data are presented).

Once again, thank you very much for your participation. If you have any questions at any stage of the project please do not hesitate to contact me.

Yours sincerely,

Yves Givel

INFORMED CONSENT FORM

LEADERSHIP IN LEARNING ORGANIZATIONS

I agree to take part in an interview as part of the above named project. The research has been clearly explained to me and I have read and understood the participant informed consent letter. I understand that by signing the consent form I am agreeing to participate in this research and that I can withdraw from the research at any time. I understand that any information I provide during the interview is confidential and will not be used for any purpose other than the research project outlined above. The data will not be shared with any other organizations.

I agree that the interview can be audio taped by voice/tape recorder: ☐ YES ☐ NO

Name: (please print)

Signature:..... Date:

Appendix 8:

Communication by CEO

The attached document shows a memo e-mail that was sent out by the case study organisation's Chief Executive Officer at the beginning of the week when the re-organisation started in 2012. He announced the different structural and organisational changes that were supposed to move the company forward.

4 pages

This memo has been sent to General Managers and employees in the Corporate and Regional Offices. Please share with your teams.

Dear Colleagues,

I am writing to you as we transition to a new organization structure and operating model designed to make the company more flexible and responsive. The new structure is the result of a great deal of work and thought and is designed to allow us to operate as a more cohesive and innovative organization. I am delighted to share additional details about the changes we have made and the new ways we will work together.

First, let me summarize the major initial steps we have taken and the rationale behind them:

- We have consolidated certain activities that formerly were fragmented or duplicated across the organization.
- We have created three new operating regions, adjusting the geographic boundaries of our previous divisional structure, and shifted the reporting lines so that the heads of each region will report directly to me. This will increase my proximity to the challenges and opportunities in each of our markets. At the same time, with the participation of the Global Operations Center (“GOC”), the new structure will foster a broad, “enterprise-wide” perspective and awareness among members of the leadership team as we continue to grow around the world.
- Where possible, we have pushed authority and accountability from “corporate” to the “field” so decisions can be made by people closest to our guests.
- We have added brand management positions for brands that did not have them previously and aligned a number of functional initiatives by brand as a step toward intensifying brand differentiation and enhancing brand health.
- To ensure that we have a single way of doing those things that should be common and consistent around the world, we have created the GOC. Among other things, the GOC will roll out innovations efficiently and effectively, while the regions will adapt those new approaches to their local markets.

I have included more specifics about key changes below and detailed organizational charts on [\[name of company intranet\]](#)

The changes we have implemented were designed keeping in mind our core Values, our Mission, and our Goal of becoming the most preferred hospitality company. While the structural changes that became effective on October 1st will serve as the foundation for our future, a key purpose of the realignment is to change how we work together, and I know I can count on your openness and willingness to work differently moving forward. Many of you will be taking on new roles and will begin working with new people. I ask that as you carry out your responsibilities, you seek opportunities for further collaboration, coordination, openness to new ideas, efficiency and flexibility. Our behaviors – the empathy with which we listen to guests and colleagues, the speed with which we respond to change, our willingness to take informed risks and learn from our mistakes -- are key factors that will ensure the success of our new organization and increase our ability to drive innovation, differentiation and preference during this exciting period of transformation at [case study organisation].

Thank you for all that you are doing and for your continued support as we move forward together.

Warm Regards,

[name of CEO]

Key Functional Changes:

GOC – The GOC exists for two primary purposes:

- 1) To align the processes and philosophy around how we, as **one [case study organisation]**, define our brands, design and operate our hotels, manage and develop our talent and deliver innovative guest experiences. This alignment will be formed in collaboration with Corporate and Regional interests to ensure the most critical processes are refined to deliver **valued** results.
- 2) To facilitate a forward thinking culture that is focused on the creation/evolution of new hospitality experiences, concepts, partnerships, customers and leaders whose influence will define the future of [case study organisation]’s *authentic hospitality*.

The GOC philosophy: [case study organisation], as *one culture, one company*, will most effectively be influenced by a GOC that facilitates a culture of listening, collaborating and consensus building across all regions.

The GOC’s priorities are to:

- 1) Facilitate brand clarity and integrity through product design, customer experiences and employee alignment
- 2) Operationalize and scale tested innovations
- 3) Establish effective and efficient internal communication processes and messages that support a “one [case study organisation]” culture
- 4) Globalize and standardize processes, as appropriate, in the areas of Product Design, Human Resources, Finance and Sales that most influence the operation of “one [case study organisation]”
- 5) Organize a global Information Technology strategy and organization that will competitively differentiate our products and services for our internal and external customers

Regions – Regional structures have shifted from the previous North American / International structure to three distinct regions that will each report to the President and CEO. This is intended to increase our responsiveness for our field colleagues and to enhance our practice of customizing to local tastes and preferences. Within the regions certain reporting lines have shifted to allow each Region to be more fully equipped to execute all aspects of our business in the region.

Finance - The streamlined Finance organization brings together related activities that have been traditionally separated due to business unit reporting standards. This is intended to create efficiency, consistency and integration while eliminating duplicative processes. As an example, selected activities (e.g., Hotel & Corporate Accounting) have been consolidated into a focused group while activities that provide support, guidance, governance, and shared learnings (e.g., Hotel Financial Planning & Analysis) will be organized within a framework designed to establish a consistent approach around the world, but with resources to be available for analysis in each Region.

Human Resources – The creation of the GOC and reconfiguration of the regions presents an opportunity to create greater alignment to support our growth ambitions and talent development. The redesigned HR function streamlines and centralizes activities to allow us to take one approach to the fulfillment of our People Brand, assessment of talent and development of future leaders. GOC HR and the corporate Human Resources team will ensure [case study organisation] has a

unified culture where activities and processes are aligned to achieve the organization's long-range plans. Hotels will take greater ownership over conducting local HR activities.

Marketing & Brand Strategy – The Marketing & Brand Strategy organization will be brand-led with dedicated managers for each of our brands. Other functions within Marketing (Content & Creative, Analytics, Gold Passport, Digital Strategy) will serve as support resources to help execute the organization's brand strategy. Dedicated Brand VPs in ASPAC and EAME/SW Asia will ensure that (i) brand standards are implemented in the regions with appropriate local customization and (ii) consumer insights from different markets inform the Company's global brand strategy.

Legal & Corporate Affairs – Core Legal and Corporate Affairs will remain intact and, going forward will include the Corporate Transactions Group ("CTG") and Risk Management groups. Bringing CTG and Risk Management together with the Legal team will improve coordination, allowing the consolidated group to more efficiently support the needs of the Regions and the Company.

Real Estate & Capital Strategy – The Real Estate & Capital Strategy group will be composed of the corporate development function executing on-balance-sheet hotel development and will act as a "center of excellence" for all activities affecting [case study organisation]'s capital and real estate assets. This includes setting the Company's asset recycling strategy, executing asset recycling, identifying and executing merger and acquisition opportunities and providing transaction guidance and support for the development activities in each Region (regional development teams now report to the heads of each Region). The group will maintain and report on the Company's global development Pipeline. The group will also be responsible for the Market Ranking Tool and related tools that are used to inform prioritization of development activities and setting of goals.

(name of CEO)

President and Chief Executive Officer

[case study organization]

Appendix 9:

Leadership Expectations

This document outlines the detailed behaviours the case study organisation has developed around their Performance Model (see appendix 10). The behaviours address both the Leadership Expectations, as well as the more basic Core Skills.

4 pages

Leadership Expectations

Living ■■■ Values

Demonstrating behaviors consistent with ■■■ Core Values

- Holds self and others accountable to ■■■ Values
- Acts in manner that demonstrates respect for others
- Inspires trust based on actions
- Communicates in terms of “we” instead of “me”
- Balances owner, guest and employee priorities

Demonstrating a Passion for Service

Creating a positive impact by passionately serving others

- Anticipates the needs of those one serves
- Listens to others, shows empathy and concern
- Applies service orientation in all interactions
- Actively seeks opportunities to improve service orientation
- Fosters a service culture by imparting passion for service to others

Translating ■■■ Mission to Action

Defining a plan to achieve Hyatt's mission and successfully acting on it

- Thinks strategically and propels people to make the mission happen
- Champions mission verbally and in non-verbal actions
- Learns from past experiences and creates new paths to success
- Pursues what could be rather than focusing on what is
- Helps others see how their contributions support ■■■ mission

Leadership Expectations

Inspiring Others

Bringing others along to achieve common goals

- Connects with others, drawing them to pursue the mission
- Engages and motivates team members
- Genuinely recognizes others for their accomplishments
- Exudes positive energy
- Demonstrates loyalty and builds trust

Encouraging Change

Demonstrating a vested interest in building [redacted] brand and acting as an owner to advance [redacted] success

- Reflects ownership mentality and protects the [redacted] brand
- Innovates and takes smart risks
- Seeks continuous improvement
- Anticipates and capitalizes on change
- Creates and adapts to new business opportunities
- Streamlines the way work is done

Promoting Learning

Demonstrating a thirst for knowledge and providing expertise to others to enhance their skills and abilities

- Listens and learns from others
- Seeks diversity of thought
- Owns mistakes and learns from them
- Invites challenges to own ideas, provides constructive feedback to others
- Takes interest in others' personal development
- Capitalizes on informal opportunities to coach and mentor

Core Skills

Produces Quality Work

The ability to produce high quality work in a consistent and reliable manner, in support of [REDACTED] standards and processes

- Sets an example and expects others to consistently produce quality outcomes
- Delivers quality work on time and within budget
- Accepts criticism and uses it constructively to move forward
- Seeks opportunities to incorporate positive changes that will enhance efficiency and effectiveness
- Operates as an effective and dependable “go to” resource

Achieves Results

The ability to identify priorities, solve problems, produce desired results and be accountable for commitments

- Demonstrates energy, drive, commitment and determination in pursuit of goals
- Creates practical action plans consistent with [REDACTED] objectives
- Acts in a timely and decisive manner to keep work on track
- Holds self accountable for commitments
- Demonstrates detailed job knowledge and technical expertise in one's own area
- Exhibits resilience when confronted with obstacles or challenges

Promotes Teamwork and Collaboration

The ability to build relationships within and across functions, balance individual and team goals, respect others and value different perspectives

- Supports team decisions
- Develops and leverages relationships across the organization
- Works effectively across teams and functions
- Demonstrates the ability to work with and through others to achieve results
- Values and respects others views and perspectives

Core Skills

Communicates Effectively

The ability to listen actively and identify appropriate messages and delivery methods to effectively influence others

- Communicates messages effectively, verbally and in writing
- Seeks information to improve understanding
- Listens to others empathetically
- Tailors communication style and message appropriately based on audience needs and desired outcomes
- Effectively shares information to inform others and accomplish outcomes

Shows Initiative and Resourcefulness

The ability to initiate action, make decisions, adapt, drive change, use resources efficiently and solve problems quickly, creatively and practically

- Makes purposeful decisions, considering potential impact on project and resources
- Demonstrates optimistic outlook amid changing circumstances
- Asks questions in unfamiliar situations to make informed decisions
- Consistently makes most efficient use of available resources
- Offers creative and practical solutions to dealing with obstacles
- Adapts to different people, cultures and situations quickly

Focuses on Customers

The ability to identify needs, shape actions and add value to relationships based on a central focus of customer satisfaction

- Builds and maintains relationships with customers to gain trust and understand their needs
- Demonstrates a commitment to superior customer service
- Accommodates requests in an obliging, helpful manner
- Proactively identifies and acts upon opportunities to create value for customers
- Exhibits recognition, respect and tolerance in dealing with customer-related requests and situations

Appendix 10:

Performance Model

The Performance Model summarises what the case study organisation is looking for in individuals working for them. It seems to be used in a number of HRM processes, such as recruitment, performance management, etc.

2 pages

Core Skills and Leadership Expectations

History has identified many leaders, who, through their leadership abilities, have influenced others and made lasting change. History is no different. The entrepreneurial spirit and brand pride of our leaders has lead to over 50 years of success. A key to our success is the fundamental belief that it is the employees of who are the company's most valued asset.

This commitment starts with and lives on through our leaders. It is leaders who enhance our culture by creating an engaged workforce and driving business results through their individual and collective efforts.

Our Leadership Philosophy

Our approach to leadership is simple. We believe;

- + Leadership can exist at all levels
- + Leadership is situational and provides everyone the opportunity to demonstrate leadership abilities
- + Leadership is personal and expressed through individual strengths
- + Continuous development and focus on leadership will organically grow leaders throughout the organization

Whether someone is new to or expanding their knowledge or experiences within the organization, it is important to understand our Leadership Philosophy and the skills, knowledge and behaviors expected from successful leaders.

Performance Model

Our Performance Model consists of two components; Core Skills and Leadership Expectations. Hyatt's Core Skills identify the knowledge, skills and abilities necessary to build a leadership foundation, while the Leadership Expectations define the behaviors that distinguish employees as leaders in the organization.

Specific behaviors or personal characteristics further define each of the Core Skills and Leadership Expectations. These behaviors identify what strong leaders do more frequently or more effectively than other performances and lead to performance excellence.

CORE SKILLS

PRODUCES
QUALITY
WORK

ACHIEVES
RESULTS

COMMUNICATE
EFFECTIVELY

PROMOTES
TEAMWORK &
COLLABORATION

SHOWS
INITIATIVE &
RESOURCEFUL-
NESS

FOCUSES ON
CUSTOMERS

LEADERSHIP EXPECTATIONS

LIVING
VALUES

DEMONSTRATING
A PASSION FOR
SERVICE

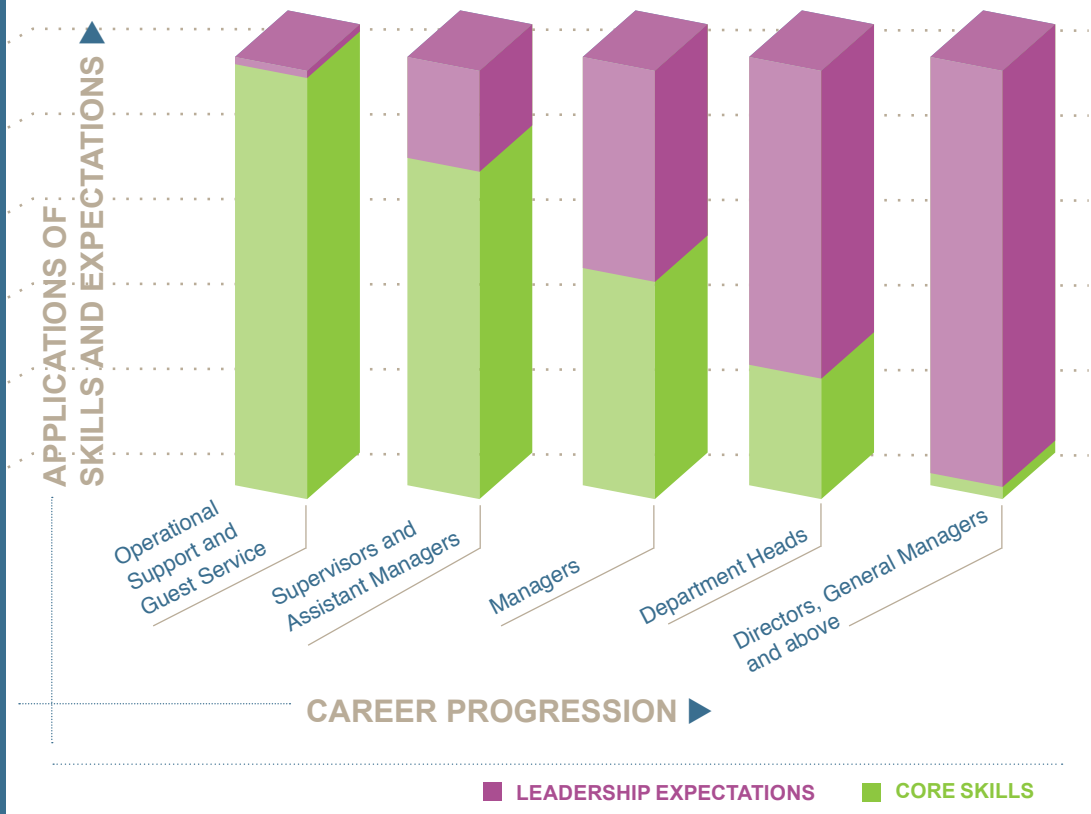
INSPIRING
OTHERS

TRANSLATING
MISSION
TO ACTION

ENCOURAGING
CHANGE

PROMOTING
LEARNING

Core Skills and Leadership Expectations



Developing strong leaders at [redacted] is a relentless pursuit and on-going process. The Core Skills and Leadership Expectations are integrated throughout the organization in order to attract, develop and retain the best leaders in the industry. We assess one's abilities and potential using the Core Skills and Leadership Expectations as our measure.

[redacted] focus on development begins with the core skills. We believe leaders can and do exist at all levels and look to recognize leadership potential.

For some people, the Leadership Expectations are aspirational—a key component in their development plan as they learn and grow in the organization. For others, based on role and responsibility, there is an expectation that the Leadership Expectations are met each and everyday.

Appendix 11:

Innovation projects

This appendix outlines the various projects the case study organisation's Lab hotels were working on at the time this study took place.

16 pages

Hong Kong - Sha Tin




Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Simplified Check-In	To simplify the current check-in process hoping to give colleagues more time to mingle with guests to understand their needs.	Hotel Idea	All Front Office colleagues are only required to do the following five steps when they check-in a guest: 1. Greet guests with a smile 2. Ask for guests' passports to register personal information 3. Confirm reservation details 4. Ask for credit card to guarantee the payment method 5. Bid Farewell
Hyboard	We put up mirrors on the wall in various locations in the hotel for our guests and colleagues to write on. The purpose of the Hyboard is to provide a communication channel among the staff and guests to share daily information.	Hotel Idea	We currently separate the Hyboard into two sections. One section is to provide general information to the guests regarding the daily weather, hotel promotions, shuttle bus schedule, etc. The other section is for our guests to provide feedback to the hotel. Quite a lot of guests wrote on the board over time. Many of them are really writing down comments on the Hyboard.
Women's Experience	To create a unique and personalized experience for our women travelers that caters to their needs. Healthy dining menus and lady's amenities are offered to the guests. We will assign rooms that will help our women travellers feel more secured. Healthy Delights Menu offers healthier options of food for guests to enjoy.	Corporate Idea	Healthy Delights Menu have been created and combined with our room service menu in our five lady's rooms. We are currently working on sourcing the amenities and getting prepared for the launch in February 2013.
Healthy Delights Menu	The Menu consists of two parts, the Perfectly Portioned part with items less than 500 calories each, and the Create Your Own part which allows guests to create their own dishes.	Corporate idea	Healthy Delights Menu is currently being tested in 34 rooms (1 floor) among the 567 rooms in the hotel. It is also tested in the lounge area of Café.
			Guests' feedback was quite positive but number of orders received from the Menu was fewer than expected.
			A Smoothie Temptation promotion is running concurrently so as to encourage guests to order from the Healthy Delights Menu. Guests who order from the menu for the first time can receive a complimentary glass of healthy drinks which are also offered in the menu.
			(Kindly see attached for the Healthy Delights Menu and the Smoothie Temptation tent card)
			Coloring games, crossword puzzles, and Sudoku games are placed on the coffee tables in the lobby for children to play with.
Kids' Engagement	Fun activities for kids are available at the lobby while they are waiting for their parents to get checked-in.	Hotel Idea	The Kids' Corner is now set up with table and chairs and a drawing easel in the outdoor covered terrace of the two F&B outlets.
Kids' Corner	A kids' playing area is set up for guests in F&B outlets to use. This is done considering the high ratio of guests with small kids in the outlets.	Hotel idea	A list of toy is being reviewed and the chosen toy will be purchased and placed in the Corner in due course.

Lobby Concept	We are hoping to improve the overall arrival experience by reorganizing the furniture and providing refreshing drinks at the lobby.	Hotel Idea	We are constructing a new refreshment table to be placed in the lobby. We will put magazines, newspapers, brochures, tourist mini-cards, and the drinking station on the table for our guests to enjoy.
Wi-Fi	To improve the log-in and overall internet surfing experience for our guests who wish to use our internet service.	Hotel Idea	We are in the process of designing a new welcome page for both computer and mobile devices.
Hygiene Card	To provide a card in the guestrooms to let them know the room has been sanitized. Housekeeping colleagues will sign the card and ask for guests' special requests to make it more personalized.	Hotel Idea	The card is placed on the writing desk in all guestrooms. HySat scores have risen significantly since the implementation of this project.
Borrow Bar Card	To provide information in the guestrooms regarding the amenities that we offer at the hotel. Provide a list of amenities that the hotel provides upon check-in. The purpose is to occupy some of the guests' waiting time upon check-in and let them know what amenities are available at the hotel.	Hotel Idea	This project is currently suspended because we are prototyping the "Anything You Need" project.
Anything You Need	To provide baby amenities to parents who are travelling with children. The purpose is to lessen the burden of our guests when they travel with their children because the baby amenities are provided at the hotel.	Hotel Idea	The card is presented to the guests at check-in and they may request for items with the Front Office staff.
What a Baby Wants		Hotel Idea	Housekeeping colleagues will place an amenities card with baby items into the crib whenever a crib is requested by the guests.
			The following sub-projects have been done or under process:
Employee Journey	Map on a today vs future journey of our employees. This journey is being used as a guide for the company to enhance the employment experience under each step of the People Brand.	Hotel Idea	<ol style="list-style-type: none"> 1. Revised Grooming Standards to allow more flexibility 2. Source of new Uniform which are more fashionable and comfortable to wear 3. New design of the orientation programme 4. Employee HyBoard - a new way of internal communication 5. Digibuddy - company account on Facebook 6. Free WiFi in Employee Restaurant
			Mini bar items are rearranged so that the lower shelf of the refrigerator is cleared for guest use.
Mini Bar	List of mini bar items are revised to better suit the major market (i.e. Chinese) and to offer the local favors to guests	Hotel idea	New items including Chinese herbal tea, honey green tea and canned coffee are added to the list of items.

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Business Plan	The possibility of each and every staff easily answer what are the hotel's goals and actions taken by their team to achieve them.	Corporate Idea	ON GOING - Working on how to set the Business Plan goals common for every single department and high engagement from every employee on both actions and implementation. The 3 most important goals to be achieved in 2013 are already set; managers with their team discussed, created and implemented their scoreboard for each goal selected featuring 2 creative and reachable actions for a quarter. Actions and results must be reviewed and validated each month in order to achieve the year goal. Next step is to work on a smoother and rolling Business Plan process
Fashion Team	The team was created to work on uniforms' changes and adjustments according to users' needs. Grooming standards is also included on this project	Hotel idea	ON GOING - Users from all 24 current different types of uniform were interviewed. Uniform supplier and stylist are helping us to design new uniforms (or adapt part of them) based on the user's needs. Several different prototypes are been tested by the following departments/role: Laundry staff; Pregnancy Dresses; Guest Service Officer (male and female); Doorman; Housekeeping Attendant (male and female); Cook and Waitress. Up to February these uniforms will be implemented and others will be selected to be worked on.
Employee Restaurant	The ability of employees to choose the "Special Meal" of the following week to be served on the Employee Restaurant.	Hotel idea	COMPLETED - Every Thursday, employees can vote on the Special of the following week. They are presented with 2 options of main course and 2 of side dish previously selected by the Nutritionist based on production and food cost. The employee satisfaction regarding the Employee Restaurant has increased and complaints decreased tremendously. This is not a prototype anymore, it is already implemented.
Meeting Planners	Create a better experience (before, during and after an event) for Meeting Planners that choose to organize their event at [REDACTED] São Paulo	Hotel idea	ON GOING - Needs and insights raised by Meeting Planners were grouped in different improvement areas. We've started to work on "courtesy" by prototyping a "Meeting Planner Concierge" featuring 3 different segments: exclusive lounge area for meeting planners to relax with TV, sofas, complimentary coffee, water, soft drinks, juice and snacks; quick access to internet – also complimentary; and an exclusive event concierge ("the landmark") – this person helps with any request and help related to the event made by meeting planners (quicker answer and problem solution). We have been prototyping in different formats and spots of the events area before deciding to where and how it will be implemented.
What a Girl Wants	Create a more personalized in-room experience that meets women's needs	Corporate Idea	COMPLETED - Several ideas to customize a "female room", such as introducing a transparent shelf attached to mirror by the sink, welcome female kit, housekeeping sticker note - procedures taken to assure the room was perfectly cleaned prior to the arrival, housekeeping notes - featuring many pieces of information to help the female traveler to feel more at ease while in the hotel and in the city, dedicated telephone extension for women answered by a woman, room service "ladies serving ladies" concept. To capture more details of their stay and give a closer attention to their opinion, our Guest Relation team send everyday 15 pre-arrival emails to women offering their help by attaching a document "Anything you need" to anticipate any "special" items needed for their future stay.

Transient Room	A dedicated space for guests coming before check-in time or room availability to be able to refresh before going to work.	Hotel idea	ON GOING - Guests and employees have been giving their feedback on the prototype, which is bounded with tapes and a 3D floor plan. There will be 3 transient rooms where guest will be able to shower, steam their clothes, get ready for work and other amenities. By December 17 th , we will have decided, with the help of an architect, the final plot of the rooms. COMPLETED YET EVER GOING - We are disseminating the design thinking approach by training employees using D School materials and crash-courses, such as Design a Wallet and Gift Giving Exercise. Currently we have 130 employees that have experienced that.
Trainings	Raise the awareness of the concept "Lab Hotel", what it is, what they do, how and why	Hotel idea	
Sponsor of Love	Create several actions that will lead to the irrational loyalty of our guests, employees and investors	Corporate Idea	ON GOING - Every week 10 guests are selected to be given a more customized service by sending a pre-arrival email (offering help with guests' stay), interact with them during their stay and when appropriate give support to anything that could help the guest to feel more cared about while he/she is away from home. In the month of November we've sent 179 emails of which 74 guests answered (41%). By next week we will start to prototype the Sponsor of Love Card – offering a 30 minutes of free internet to the guest connect with their loved ones.
Connecting Managers Challenges	Enhance the usage of Design Thinking approach by managers to encourage them help each other (and ask for help) to solve their current issues.	Hotel idea	ON GOING - Creation of multidisciplinary group of managers that acts as consultants to help other department to find a solution to their current challenges. In November, 5 Consultant Groups randomly picked a challenge raised by all managers placed in a draw. They have until December to solve it. Findings will be discussed on the Annual Managers Meeting.
Working organization	Re-organized working organization to have longer shifts of 5 days per week instead of 6 days.	Hotel idea	ON GOING - Following the feed back we got from our "Best day of an employee", we tested in 3 departments during 1.5 months this organization (kitchen, service and reception) and gathered the comments and feed back. We are now studying the possibility to implement pending local Union process.
Employee Journey	Survey the employees and create a path of a typical day (good and bad) so that we could launch initiative to improve our employees' experience at work	Hotel idea	ON GOING - The typical days were designed and are a base for us to initiate other projects such as Employee Restaurant, work organization, ...
Every one is a host	Facilitate the arrival and leaving experience of our guests while providing them a better and warmer welcome	Hotel idea	ON GOING - Check in process was reviewed to limit to a strict minimum the red tape and be more concentrated on guests needs / wants. Our NPS c/i improved since the implementation reaching last November nearly 80% NPS. Concierge is now trained to assisting check in when the desk is loaded. Credit card interface between Opera and payement terminal has been improved and one last step remains to be done.
White board communication for employees	Direct way for the employees to communicate their thoughts, suggestions, ideas and thoughts through topics of the week.	Hotel idea	COMPLETE YET EVER GOING - The white board is located in BOH corridor near staff restaurant. As an example, the working organization project came from many suggestion given on the board. Also, all on going projects get massive feedback and ideas from employees by posting and communicating through the board.
Friction free wi-fi	Connecting our employees during their breaks	Hotel idea	COMPLETED - Free internet wifi provided at the Employee Restaurant

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Mobile Concierge	Posted in Union Square 3 times a week to assist lost tourists. Complimentary walking tour of Union Square on Saturdays at 1:00 PM (May - September)	Hotel	<ul style="list-style-type: none"> With the lobby renovation complete there will be a dedicated mobile concierge within the building 5 days a week
Food Truck	Different food trucks stationed outside the hotel to create local buzz. Next steps include a OneUp branded truck to market the opening of the new restaurant and involvement in community events.	Hotel	<ul style="list-style-type: none"> OneUp Food truck unveiled at Grand opening party November 27-30 will be outside the hotel from 11:30 AM – 2:00 PM serving cremuex In December will be working with Off the Grid to appear at different locations around the city.
Bee Keeping	Introduced (2) Beehives to our low riser roof. This was the first step in launching another stainable food project.	Hotel	<ul style="list-style-type: none"> The apiary consists of two nascent beehives, containing around 100,000 bees in a 2 frame "Langstroth Beehive" Beekeeper will give landowner 10% of honey from hives (2 not owned by the [REDACTED] by weight at harvest and \$2/person per visit per student taking beekeeping classes. Plus rental of space for class Roundrock Honey will own (2) hives and The [REDACTED] will own (2) hives. In exchange for Roundrock Honey having the two hives on the roof, Roundrock Honey will maintaining all the hives and environment in a proper pollinating condition by inspecting and maintaining designated area. As well as mentor employees that have interest in the project. Over the next few weeks the bees will be adapting to their new Union Square home and for the most part they're self-sufficient. The bees' honey will be used by the hotel's Restaurant & Bar in various desserts, dressings and beverages. Distributed honey from these hives as part of swag bag at opening party. We anticipate the beehives will approximately 800 pounds of honey.
Chinese Brand Preference	Offer welcome letter in both Chinese & English advising hotel information to assist with improved communication, offer simplified compendium in Chinese. Offer 7 Chinese meal options through room service. Add following amenities to guest room prior to arrival: robe, slippers, tea kettle, green tea & traditional tea cups.	Corporate Rooms	<ul style="list-style-type: none"> Sample for this guest segment is very low. We have only received a total of 15 responses (10 prior to launch, 5 since launch) in HySat from Chinese guests in 2012. We will need more sample to accurately capture any effect on satisfaction for this particular guest segment
Tranquility of guest room	Increased monitoring of hallways and signage indicating the floors are "quiet floors" placed at the elevators. Limited TV volume controls on this floor. Purchased quieter vacuum cleaners for room attendants. Conducted full acoustic assessment by professional sound engineer.	Hotel	<ul style="list-style-type: none"> The tranquility score on quiet floors has gone up 22.5 points with NPS going up 2 points since the above were implemented When comparing quiet floors to control floors (26 & 27) there is a 13 point difference in tranquility & 20 point difference in NPS. Collaborating with Joel Beckerman on creating a "soundtrack of guests stay" (www.manmademusic.com) Adding 26 & 27 to Quiet Floor Program.
Express Welcome	Select group of guests are participating in a program where they have a card they keep with them that allows them to bypass the check-in desk	Corporate Rooms	<ul style="list-style-type: none"> We've received a total of 2 responses to an ad hoc survey from guests who are enrolled in this program that have stayed at GHSF. We will need a larger sample to draw any initial insights
Front Desk Design	Y shaped desk that allows for a more open and personal interaction with the guest at check-in	Hotel	<ul style="list-style-type: none"> At this point, the results for Check-in Satisfaction are completely even: 68.2% for pre and post new desk installation. Different demographics have different comfort levels with this prototype

GP Diamond Recognition	Partnering with HGP to test guest recognition when they are achieving Diamond stay during a particular stay.HGP will email PLAT guests ahead of time and hotel will recognize upon arrival and offer a special gift of their choice to be billed to GP.		<ul style="list-style-type: none"> Initial responses have been very favorable
Friction free wifi	High Speed Friction Free Internet throughout the hotel. Internet is provided complimentary in the lobby and fitness center. Standard internet offered at 2 Mbps & Premium at 5 Mbps	Hotel	<ul style="list-style-type: none"> October's Internet score is up 30.8 points from the previous month. The score is currently at 21.4, which is the highest it has been all year, however, based on text comments there is still frustration with the connectivity. Given the dissatisfaction with the Internet in September due to the upgrade, we will want to monitor the scores over the next couple of months. Hotel is currently evaluating offering 1 Mbps comp for all registered guests. On completion of Roomlinx installation there were decreases in the 3 most common problems, and our percentage of detractors for internet also decreased from 39.5 (pre-upgrade) to 32.3 (post upgrade) Initially placed a water cooler on one floor that was completely empty within 48 hours. Expanded to all even numbered floors. Considering sale of  branded water bottles in retail space.
Hydration station	Water cooler placed on every alternate floor for guests to use. Exploring a partnership with Brita for front of the house Hydration Stations	Hotel	<ul style="list-style-type: none"> Initially placed a water cooler on one floor that was completely empty within 48 hours. Expanded to all even numbered floors. Considering sale of  branded water bottles in retail space.
Womens Preference	Testing one floor with improved attention to womens amenities F&B preferences and products. Rooms have women's robes, lighted make up mirrors, make up remover pads, shower caps, plastic individually wrapped cups, sanitizing wipes. Avialble upon request: hair brushes, flat irons and many other products.	Corporate Rooms	<ul style="list-style-type: none"> There have been a high number of guest requests for hair brushes & flat irons due to the guest request card placed in the room. Sanitizing wipes are also seeing high usage.
Retail Experience	Point of View : A traveler visiting San Francisco needs a way to share their local experience with loved ones because they want to show thoughtfulness/appreciation and create memories.	Hotel	<ul style="list-style-type: none"> Empathy collected from guests focused on “buying gifts for loved ones”, “unique gifts” & “memorable travel experiences” Based on this we have invited local artists to showcase their art for a few hours each week. Conducted a Tcho chocolate tasting in the lobby. This was very well received. Selling GH logo bottles at Concierge desk to complement Hydration stations.

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Plastic Cups (Hygiene)	Provide sanitary plastic cups. Eliminates perception of unclean glassware.	Hotel Idea	Working with Illinois Institute of Design to gather additional guest feedback through empathy interviews.
Remote Controls Sleeves or Sanitary Wipes (Hygiene)	Hotel tested the effectiveness of putting remote controls in sleeves and using Wipe in different guestrooms and then solicited feedback. Wipes were the preferred choice.	Hotel Idea	Hotel is using up inventory of sleeves. But is beginning to place Wipes in all guestrooms. Hotel is ordering Logo'd Wipes.
Dyson Vacuums (Hygiene)	In Executive Wing, housekeepers use Dyson vacuums to clean the guestrooms and collateral has been placed in rooms to inform the guests.	Hotel Idea	Working with Illinois Institute of Design to gather additional guest feedback through empathy interviews.
"Room Sanitized" Sticky Notes (Hygiene)	Guests see a personalized note from the room attendant notifying them of the cleanliness of the room.	Hotel Idea	56% of guests noticed the note. Of those, 36% agree and 22% strongly agree that the note improved their impression of room cleanliness. However, those guests that noticed the note gave the hotel a lower Net Cleanliness Satisfaction score (41.6) versus those that did not notice the note (57.1).
Private Delivery	Guest request items delivered to room in a private delivery bag and placed on door with a knock. Much less intrusive to a guest that ready for bed or in the shower. Allows guest to retrieve items when ready.	Hotel Idea	Initiative has been implemented. Collateral on order.
ESC Bar	Allows guests to hold informal meetings and provides additional work stations within Lobby.	Hotel Idea	Prototype was successful. Current estimate of professionally designed permanent furniture and related work is cost prohibitive.
Mobile Check-in (iPads)	Check in guests using iPads. Initially, this was done in the lobby near the front desk. After empathy interviews with customers and associates, it was decided to perform the check-ins closer to the front entrance.	Hotel Idea	Being implemented with adjustments.
Airport Shuttle Check-in (iPads)	Guests are able check in and receive their room key in transit to the hotel.	Hotel Idea	Continued efforts to improve process. Addressing need for front office agents to stand out. Evaluating new uniforms. Plan to move ahead soon with the initiative.
Free Wifi	Provide free basic internet to all guests.	Hotel Idea	Working with Illinois Institute of Design to gather additional guest feedback through empathy interviews.
Internet Access on Shuttle Bus	Benefits guests and associates. Assists in Mobile check-in.	Hotel Idea	Working with Illinois Institute of Design to gather additional guest feedback through empathy interviews.
White Bed (No decorative pillows or throws)	Pillows and throws removed and stored in the drawers of every room. One decorative pillow stays on bed to make it appear complete, as opposed to not finished by the room attendant.	Hotel Idea	Room attendants stated that numerous guests, male and female, remove them soon as they enter room.
Employee Pictures Posted on Strandvision (Know Me)	Pictures and basic information gathered for all new hires and posted on hotel Strandvision. Allows all associates to get to know new associates.	Hotel Idea	Implemented
Create a Sales/Catering Quarterly Newsletter (Know Me)	Keep general staff informed about Sales News	Hotel Idea	Implemented
I Am What I Eat	Voting system created by HR and Culinary where associates vote for one specialty food item per week. Also, associates asked for water coolers be added around the hotel.	Hotel Idea	Taco Tuesday has been implemented. Water coolers have been ordered.

Alternative Working Hours - Support Departments	Review alternative working hours for HR and Accounting. Setting up Lab Room with picture collages of existing projects, associates involved in Project X prototypes, etc. Using existing tables, chairs and furnishings found in storage to create rough prototype. Potentially a great place for internal meetings, brainstorming sessions, and other lab work. A place to be inspired and engaged.	Hotel Idea	Empathy interviews are taking place with the first and second shift associates in these departments to gain insights into what they want and the perceived benefits of providing additional flexibility in scheduling.
	As supplies are always an issue at a large hotel, each department has chosen a Supplies Captain. When someone sees that they need additional supplies, they inform the supply captain and he/she is responsible for making sure they get what they need to perform their work.	Hotel Idea	Hotel would like to request some money in the 2013 capital budget to install some additional permanent furnishings.
ACT: Supply Captains	Conducted empathy interviews with the CS and Engineering staff. Based on that feedback, the hotel has ordered additional Quiet Zone signs and lights for BOH areas. Stewarding and Kitchen are on on radio channel to reduce radio traffic noise. Engineering has performed a wholesale replacement of the wheels on all of the rolling catering carts used by catering staff - utilizing softer rubber wheels to eliminate squeaking and chattering. Some narrow BOH corridors will be carpeted as well to reduce noise.	Hotel Idea	Has been implemented, and adjustments will be made as necessary.
Reduce Noise around Meeting Rooms	Free up more of the meeting concierge's time to interact directly with the meeting planners and meeting attendees by having certain advance set-up items performed by other staff. CS overnight staff to place the sign holders with that day's current information in front of the individual meeting rooms. Security unlocks all the meeting room doors in the morning. Also- looking at the use of iPads or iPhones for the manager in lieu of the existing bulky binder that is carried around all day. Some items that the hotel has tested but failed include: Flip Flops in guest rooms; iForgot Bar, High Performance Meetings (healthy options, high energy meetings); Sleeves for remote controls; White boards in Departments; Levitating Beds.	Hotel Idea	These items have been recently implemented.
Meeting Concierge Initiative		Hotel Idea	Some of the operational items have been implemented. The use of iPads in lieu of binders is being investigated. The hotel will be requesting permanent digital signage for the meeting rooms in their capital budget for 2013 (subject to approval by asset management).
Failed Items		Various	These items have been killed.

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Flexible Space - Hi / Low Tables	Lightweight movable tables- offer standing options and move with flow of morning versus evening business in lobby	Hotel Idea	on going
Flexible Space - Impromptu Meeting Space	offer convenient meeting space in open lobby concept at no charge	Hotel Idea	on going
Flexible Space - Connect Me White Board	Enhance communication and connection with customers with interactive board. This concept was also added in associate dining room	Hotel Idea	on going
Flexible Space - Bean Bag Chairs	Offer flexible furniture option that can be easily moved by our guests to create their own spaces in public areas	Hotel Idea	on going
Flexible Space - Bean Bag Chairs II	In guest suites for VIPs	Hotel Idea	on going
Flexible Space - Large Chess Set	Promote a place to work and have fun	Hotel Idea	on going
Flexible Space - Hammock Swing			
Flexible Space - Portable Laptop Tables	introduced portable/adjustable lap top tables in the lobby and bar area for guests to move and use due to limited surface area on tables or low tables	Hotel Idea	on going
Friction Free Wi Fi - Allow up to 3 device for price of 1	simple sign on for guests with multiple devices and reduce charges for more than one	Project X Playbook	on going
Friction Free Wi Fi - Complimentary Internet Access in Lobby / Restaurant / Bar	patrons of outlets or guests requesting lobby access are provided with complimentary access code for Internet access in public area spaces	Project X Playbook	on going
Friction Free Wi Fi - Increase bandwidth	from 45mbps to 100mbps	Project X Playbook	on going
Friction Free Wi Fi - special \$4.95 rate for 4 hours	address price point concern of summer travelers and those that want to access email for limited durations	Project X Playbook	completed 8/31/2012
Friction Free Wi Fi - Comp to Gold Level	Offered complimentary Internet access to all GP members and any new enrollments.	Project X Playbook	completed 8/31/2012
Friction Free Wi Fi - charging stations	added computer and cell phone charging stations in public areas	Project X Playbook	on going
Hyperformance Meetings	introduced banquet 2.0 program, energy conscious food, charging stations and electrical stations, flexible furniture and meeting room designs, introduce get planning program on iPad for meeting planners	Hotel Idea	on going
Asian Preference - Roll out first prototype with Chinese travelers- second prototype to add Korean travelers	Offer welcome letter in both Chinese and English advising of hotel information to assist with improved communication with foreign travelers, offer simplified compendium in Chinese and full in English, added steamed rice and miso soup at TusCA buffet, offer 7 chinese meal options through room service- prepared in traditional style, add following amenities in guest room experience- robe, slippers, tea kettle, green tea, traditional tea cups, travel amenity kit, luggage rack. World News Newspaper purchased 7 days per week- 10 copies. (Adding Pheonix TV channel option 11/2012)	Hotel Idea	on going

Make-up Remover Wipes - Single make-up remover wipes placed in Dance Group Rooms	Appeal to need of dance groups that wear performance make-up and reduce loss experienced with use of terry to remove make-up causing stains.	Hotel Idea	completed 3/12/2012
Women's Preference- Test to run in 3 guest rooms with improved attention on women's amenities, F&B preferences, and products	Testing: enhanced closet space- more drawers and shoe storage area, add additional shelving for women's travel items, add steamer, women's sized robe, women's magazines, new Kenet MD bath amenities, scented oil diffuser, lap top/IRD tray for use in bed, cozy blanket, enhanced bathroom lighting, enhanced make-up mirror, additional hangers, additional bath towels, add foot lotion- face lotion and lip balm, q-tips and cotton balls, add personal preference menu for IRD, smaller portion sizes in food, to go snacks, purse hangers in F&B locations, notched hangers, jewelry tray, pillow mist, electronic charging station, future idea to add calorie count in IRD menu, yoga mat and free weights in room, enhanced guest request items focused on women's product brands- flat iron, curling iron, women's razors etc with private delivery option- added text option after one month of test.	Hotel Idea & Project X Playbook	on going
Long Stay Guests- 6+ night stay guests	Guarantee bed type, preferred room location, luggage rack, travel amenity kit, surprise F&B amenity during stay, additional hangers, email prior to arrival and offer to provide preferred amenities.	Hotel Idea	on going
Room Attendant Card - modified version of room attendant card left on beds- Hong Kong version	Room attendant card offers guests an opportunity to share any special preferences or cleaning requests directly with the room attendant, also targeted to produce an improved sense of cleanliness from the guest as well as more ownership from the room attendant.	Hotel Idea	on going
Private Delivery - all women's preference rooms	delivery of guest request items- leave bag on doornob and knock to all guest to retrieve requested items in privacy	Hotel Idea	on going
Private Delivery Text Option - all women's preference rooms	improve flexibility to text guest request items	Hotel Idea	on going
GP Keypacket & Card Test - Focused on Diamond and Platinum Members- offer special key and keypacket with benefits and special F&B discount	Improve recognition of Diamond and Platinum GP members- train staff to recognize by keys being used and engage with them, offer special F&B discount for each 20% Diam 10% Plat	Deep Dive Lab Idea	completed 10/31/2012
Digital Hotel - Skype Booth	Added v1 low res prototype in lobby for guests to connect with loved ones- complimentary, desk with privacy backing, wireless headphones, comp computer access to connect with skype, oovoo and tango.	Hotel Idea	on going
Digital Hotel - iPad Photo Op	associates in public areas, bar, restaurant, lobby to interact with guests and offer photo op on [REDACTED] email / postcard style to send home- wish you were here or wish I was there moment. Help create new memories	Hotel Idea	on going
Digital Hotel - Telepresence Option	partner with Citrix	Hotel Idea	on going

Digital Hotel - Mobile Concierge / Texting Options	Offer guest text number to ask for any request, at anytime, anywhere they are and have hotel associate respond and follow-up.	Hotel Idea	on going
Digital Hotel - VPOD	future resolution to Skype booth test to be placed in lobby- large enough for 2 participates (vpod 1 version) projected Mid December	Hotel Idea	
Digital Hotel - Super WiFi Blanket	Upgrade wifi network to allow connect/detect/engage options with guests in the building. Connect- give guests top notch wifi experience hassle free / Detect- detect movement, trends, and occupancy of guests through Mac addresses / Engage- HTML overlays on guests mobile devices to offer services "open parking spaces" "special happy hour in evolution bar" - push HTML- cloud apps	Hotel Idea	TBD
Digital Hotel - Apple TV	Create the guest home experience at the hotel with Apple TV - offer iPad for those guests not traveling with Apple products to enhance experience.	Hotel Idea	
Digital Hotel - Jackpack	Allow guests to recreate their home experience at the hotel with jack pack TV connections	Hotel Idea	
Digital Hotel - Connection Stations	re-arrange seating groups, add more power stations, add charging stations and individual devices to assist with staying connected	Hotel Idea	on going
Digital Hotel - Improve recognition of when GP Platinum Members reach Diamond Status	Partnering with [REDACTED] to run test in our hotel to recognize guest's on the spot when they are achieving Diamond status during a particular stay. [REDACTED] GP will email Plat guests who will be reaching this stay to hotel in advance. We will recognize them at check in and offer special gift of their choice (choose from list provided by GP) and billed to GP program	Hotel Idea	TBD
Digital Hotel - Brightbox Charging Stations	90 day trial of multi device charging stations. Secured vault for devices in public areas	Hotel Idea	Started 11/26/12 and on going
Digital Hotel - Project Symphony	Guest and colleague digital experience journey work with AKQA supporting the effort. Crucial in our "Know Me"/personalized experiences focus!	Corporate	TBD

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Hotel Uniform	New uniforms has been introduced for Front of the House Associates and working on Back of the House uniforms in consultation with countries renowned designer - Ravi Bajaj	Hotel Idea	Active
Let your hair down Saturdays	Ladies in back of the house may accessorize or set their hair as they want	Hotel Idea	In Active
Flexible Working Hours	No extra hours during additional off weeks, Casual Leaves during Additional Week Off	Hotel Idea	Active
Job Title	Streamlining job titles in all department to encourage multi skilling and career Development	Hotel Idea	Active
Grocery shop for employees in hotel	Staple item to be sold to staff at cost	Hotel Idea	In Active
Employees Vehicle Parking	Dedicated space identified nearby the Hotel premises for the parking at the discounted rates	Hotel Idea	Active
Guest Experience Manager (GEM)	Conversion of Duty Manager to GEM, No more exhaustive checklists, Enhanced entitlements for self and guest meal entertainment , Will be the manager on shift for any guest issue, Feedback shared with management, Get stories and feedback	Hotel Idea	Active
Share the Highs-- MEETINGS	Will be done at the end of every shift with all team members To be taken by supervisor/manager on shift, Positive Guest Comments, Excellent Service Touch Points, Performer of the day!	Hotel Idea	In Active

Complimentary Internet for Public Area	At Sidewalk and Polo Lounge to, drive experience and F&B Revenue	Project X	Active
Easy Log In Page	User Friendly Internet Access	Project X	Active
Wi-Fi on wheels	Hotel cars will be equipped with Wi-Fi devices	Hotel Idea	Active
Enrollment Upon Check-out	To increase the gold passport members	Hotel Idea	Active
Compiling list of Non gold passport members arriving next day	Communication amongst the team to enroll them for Gold Passport	Hotel Idea	Active
Room Cleaning Card	Personalized card signed by Room attendant	Hotel Idea	Active
Room Smell & Air Quality	Ionizer & ecostrips has been placed in the rooms	Hotel Idea	Active
Indicated Strips	Towels wrapped with strip to notify they are hygienically clean and unused	Hotel Idea	Active
Hygiene Camp	Hygiene camp was organized for Hotel Employees - Grooming, Makeup sessions for Female employees, Yoga & Zumba Sessions were also introduced	Hotel Idea	Active
Sterilization of remotes	Assurance of continues hygiene	Hotel Idea	Active
Key dockets with map of lobby & pool level	Medium to share Hotel Information	Hotel Idea	In Active
Mobile Crew check-in	With over 100 Crew rooms a night the lobby team has tested their checkin experience, the checkin Formalities were done en route from the airport in the crew bus itself	Hotel Idea	Active
Welcome to [REDACTED] Text Message	At Airport for guest using hotel transportation. Welcome to [REDACTED] message sent 2-3 hours prior to arrival, includes name and contact of Airport Representative and the location	Hotel Idea	Active
I Forgot Bar	located in the lobby. Options of Borrow and Buy items from Personal care, stationary,Chargers etc	Project X	Active
Lobby Seating	Communal Table with bar stools,plug points. This also includes a Refresh Bar – self help tea/ coffee, soft drink juices	Project X	Active
Scanning guest passport in room	Guest passport details can be scanned in front of the guest with the help of portable scanners	Hotel Idea	In Active

Multiple Mini Bar Options	4 Prototypes has been introduced and are currently under testing stage No mini Bar, Soft Mini Bar, Soft Mini Bar with hard beverages & Healthy Mini Bar	Hotel Idea	Active	
Meeting Concierge Team	One point of contact, Detail Job Descriptions, Empowerment, Areas of operations	Hotel Idea	In Active	
In Room Check In	In room check In for all the Regency Club rooms and suites	Hotel Idea	Active	
Express Check out	If the guest is interested in express check out – only the signatures will be taken on the folio and the payment will be taken after departure of the Guest	Hotel Idea	Active	
New Regency Club	New Food & Beverage service sequence - Under Renovation	Hotel Idea	In Active	
Ambassador of Love	Ambassador will be hired with custom Lab, Stickers for [REDACTED] branding	Hotel Idea	Active	
“Sponsors of Love”-Winter Donation	Initiative for donating clothes for charity	Hotel Idea	In Active	
Implementation of Woman Program	In Room Private delivery Delivery by female employees only Healthy Menu for ‘Her’ Recipes on request	Hotel Idea	Active	

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Tranquility	Improve the guest sleeping experience	Hotel Idea - noise is biggest problem on HySat surveys.	In its infant stages, hotel looking at pricing for installing dynamat in sampling of guest rooms. Established tranquility zone for guests, offering tranquil music/video and complimentary tea each evening 7 p.m. - 11 p.m. Team has held numerous events for employees and created a "white board wall" to solicit feedback. Team purchased lockable wardrobes for Outlets and Guest Services Departments to provide secure access to uniforms. Team is introducing the "Zen Zone" for employees as a place to relax during break time, features massaging loung chair, sound machine, eye mask, & scent diffuser.
Employee Journey & Engagement	Improve the work experience for all employees by eliminating barriers/road blocks. Improve the team work between all employees.	Improving the Employee Journey originated from Lab Kick Off Week ("What slows me down at work?") in May. Improving Employee Engagement has been a year long focus to drive the relationship between management and line staff.	Stationary Energy Bar with high seating, charging station offering complimentary coffee/snacks is evolving into a mobile coffee cart. Hotel also installing hardware for Express Welcome & iPad check in experience (to be completed in January 2013).
Lobby/Host	Improve guest experience in the lobby. Everyone (employee) is a host.	Corporate Innovation Idea @ Lab Kick Off Week	Hotel has 30 rooms (8% of inventory) set to WWW standards. Hotel also participating in the borrow/buy program in conjunction with WWW.
What a Woman Wants	Become the preferred brand for women travelers.	Corporate Innovation / Corporate Rooms	Established partnership with Stamford Food Bank. Participate in their backpack for kids program by donating items as well as assisting on site by packing back packs for distribution. Hotel also sponsoring a local girls basketball team.
Community Outreach	Make a Difference in the community by supporting local initiatives.	Hotel Idea	

Name of Each Project	2-3 sentence description of Project	Origin of Project (Hotel Idea, Corporate Idea, Other?)	Current Update - Status of Project
Staffing Model	Re-design the future staffing model	Corporate idea	Testing phase
Fashion (uniforms)	Re-design our wardrobe, so that our people feel & look good	Hotel idea	Iterating
Employee dining	Re-design our employee dining experience/room that feels like a guest experience and re-energises our team	Hotel idea	Testing phase

Appendix 12:

Tenure

This page is an extract of the case study organisation's 2011 Corporate Responsibility Report.

1 page

We believe that providing people with the opportunity to grow, advance and excel is crucial to the success of our business and vital to the long-term prosperity of society and our communities. Our global family of talented associates delivers on our mission of providing authentic hospitality to our guests around the world, and we recruit our people with the strategic intent to reflect the communities where our hotels are located.

We make significant investments to attract, develop and retain talented people, who we believe serve as a critical differentiator for [REDACTED] in an extremely competitive global market for talent. In our surrounding communities, we invest time and resources in the education and skills-based development of our neighbors – cultivating our future workforce and guests.

Developing Our People

[REDACTED] is committed to helping our associates reach their highest potential throughout their careers. This is central to our *People Brand* – [REDACTED] global commitment to infuse our associates' employment experience with the same hospitality and care that we demonstrate to our guests. [REDACTED] industry-leading learning and development opportunities are available for all associates at every level in the organization. Examples include annual reviews for all associates, rotations that expose individuals to multiple facets of hotel operations, management development programs and career mentoring, all of which enable associates to pursue both personal and professional growth.

In addition, our *Foundation for the Future* program helps us prepare high-performing and high-potential associates for the role of hotel general manager. Through this course, future leaders are immersed in a curriculum aligned with our core values and [REDACTED] leadership expectations. We ensure that these development opportunities are provided to a diverse group of candidates, with a particular focus on associates from different cultures, backgrounds, functions and geographical areas in the organization. Beyond developing professional skills, associates have access to a wide range of learning and development resources on our online [REDACTED] *Leadership Network*. Our commitment to developing meaningful career paths and promoting from within are significant factors in the impressive tenure of our associates.

Associate Tenure

Around the world:

Average tenure of general managers at our owned and managed, full-service hotels	20 years
--	----------

United States:

Associates with 10 or more years of service	14,000
---	--------

Associates with 20 or more years of service	6,000
---	-------

Developing Our Future Workforce

As the number of [REDACTED] hotels continues to grow around the world, so will our need to hire talented individuals to provide world-renowned authentic hospitality to our guests. Through global and national partnerships, we provide valuable skills training and hospitality scholarships to a wide range of individuals, including those who may otherwise not have had such opportunities.

- Through the [REDACTED] Fund for Minority Lodging Management Students, we provide financial aid to minority students pursuing a degree in hotel management. To date, we have awarded more than \$550,000 in scholarships to 275 students via an endowment fund managed through a partnership with the American Hotel & Lodging Educational Foundation.
- Located adjacent to the *Chinese University of Hong Kong* campus, [REDACTED] Hong Kong, Sha Tin collaborates with the *School of Hotel and Tourism Management* to offer students an opportunity to integrate business theories with hospitality practices. The partnership provides students with stimulating opportunities to learn skills in the classroom and apply their knowledge through hotel internships.

Appendix 13:

Source Classification Sheet

Basic demographic information of all individual interview and focus group participants.

1 page

Appendix: Source Classification Sheet

Interview	Date	Interview Type	Position	Location	Reference
Focus Interview 1	23-Jul-12	Focus group interview	Banquet Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Assistant Food & Beverage Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Group Sales Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Group Sales Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Executive Housekeeper	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Front Office Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus Interview 1	23-Jul-12	Focus group interview	Convention Services Manager	Lab Hotel 1	Middle Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Director of Catering & Convention Services	Lab Hotel 1	Senior Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Director of Rooms	Lab Hotel 1	Senior Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Assistant Controller	Lab Hotel 1	Senior Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Director of Food & Beverage	Lab Hotel 1	Senior Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Executive Sous Chef	Lab Hotel 1	Senior Manager Focus Group Participant
Focus interview 2	23-Jul-12	Focus group interview	Assistant Director of Human Resources	Lab Hotel 1	Senior Manager Focus Group Participant
Interview 1	1-Jul-17	Individual Interview	VP - Learning & Development	Corporate Office	Corporate Vice President 1
Interview 2	19-Jul-12	Individual Interview	General Manager	Lab Hotel 2	General Manager, Lab Hotel 2
Interview 3	19-Jul-12	Individual Interview	Human Resource Director	Lab Hotel 2	Human Resource Director, Lab Hotel 2
Interview 4	20-Jul-12	Individual Interview	Human Resource Director	Lab Hotel 3	Human Resource Director, Lab Hotel 3
Interview 5	20-Jul-12	Individual Interview	General Manager	Lab Hotel 3	General Manager, Lab Hotel 3
Interview 6	17-Aug-12	Individual Interview	VP - Organization & Leadership Development	Corporate Office	Corporate Vice President 2
Interview 7	2-Aug-12	Broadcast interview	Chief Innovation Officer	Corporate Office	Chief Innovation Officer
Interview 7	2-Aug-12	Broadcast interview	Chief Executive Officer	Corporate Office	Chief Executive Officer
Interview 7	2-Aug-12	Broadcast interview	General Manager	Lab Hotel 1	General Manager, Lab Hotel 1
Interview 8	11-Sep-12	Individual Interview	VP – Rooms	Corporate Office	Corporate Vice President 3
Interview 9	12-Sep-12	Individual Interview	VP - Food & Beverage	Corporate Office	Corporate Vice President 4
Interview 10	5-Oct-12	Individual Interview	Human Resource Director	Lab Hotel 1	Human Resource Director, Lab Hotel 1

Appendix 14:

Sample Leadership Profile

This is a copy of the case study organisation's new Leadership Profile (created in September 2013), based on a number of findings from this research study.

1 page

Leadership Profile of [case study organization]

Care

Hyatt's higher purpose is based on care. Caring leaders build trust and engagement by cultivating genuine relationships. The capacity to care for one another is one of the strongest of all human traits. At the center of caring is **empathy**. Leaders exhibit empathy when they connect personally and deeply with those around them.

Serve

Serving leaders create success for and through others. Such leaders are motivated by service to the higher purpose, the business and its stakeholders – not by the pursuit of power or personal gain. The success of these leaders is gauged by the success of others. **They don't try to solve all problems or to have all of the answers**: they thrive by **unleashing others** in pursuit of goals. They understand and take direct responsibility for growing the next generation of leaders.

Learn

Learning leaders are **inspired by learning and they take pride in further developing themselves**. They are **not afraid of – and they learn from – mistakes and failures**. They make the intentional decision to continue to learn and grow throughout their lives, challenging themselves to be and do more, and gaining broader experiences. With their **high learning agility** and ability to be **vulnerable**, they reflect on and **learn from experience, apply that learning** to perform successfully under new or first-time conditions and share their learning, and themselves, with others.

Adapt

Adaptive leaders demonstrate **agility in the face of continuous change**. They anticipate and thrive in changing environments where diversity of thought fosters innovation and creativity. They have the **ability to create an environment where individuals can take risk, experiment, and learn from failure**: often times with great speed. Adapting leaders constantly think about what changes are needed to stay relevant in the marketplace and to fulfill the organization's purpose.

Achieve

Achieving leaders prioritize and do what is best for the business. They are outcome oriented and understand that superior financial performance benefits all stakeholders. They are bold, strategic and **future-oriented**. They see the big picture, understand how the different components of a **system** interconnect and behave over time, and help make sense out of complexity by simplifying. They possess sound judgment and can make quick decisions when needed.

Bibliography

- Adams, D., Waddle, C. (2002) Evaluating the return from management development programmes: individual returns versus organizational benefits, *International Journal of contemporary Hospitality Management*, 14 (1), 14-20
- Akin Aksu, A., Ozdemir, B. (2005) Individual learning and organization culture in learning organizations, *Managerial Auditing Journal*, 20 (4), 422-441
- American Society for Training and Development (2010) A Salute to the Best, *Training and Development*, 29-31
- Anderson (2004) *Research Methods in Human Resources Management*, London: CIPD
- Antonacopoulou, E. (1999) Developing Learning Managers within Learning Organizations: the Case of Three Major Retail Banks, in Easterby-Smith, M., Burgoyne, J., Araujo, L. (Eds) *Organizational Learning and the Learning Organization: Developments in Theory and Practice*, London: Sage Publications, 217-242
- Appelbaum, S.H., Gallagher, J. (2000) The competitive advantage of organizational learning, *Journal of Workplace Learning: Employee Counselling Today*, 12 (2), 40-56
- Archambeau, S. (2005) From Manager to Leader, *Leadership Excellence*, 22 (7), 19-20
- Argyris, C., Schön, D.A. (1978) *Organizational Learning: A Theory of Action Perspective*, Reading, MA: Addison-Wesley
- Argyris, C., Schön, D.A. (1996) *On Organizational Learning II: Theory, Methods and Practice*, Reading, MA: Addison Wesley
- Ashton, D., Green, F. (1996) Conclusion: a Framework for Policy Analysis, Extract from Chapter 8 in *Education, Training and the Global Economy*, Edward Elgar, 176 – 185
- Atkinson, P., Coffey, A. (2011) *Analysing Documentary Realities*, in Silverman, D. (Ed) *Qualitative Research* (3rd edition), London: Sage Publications, 77-92

- Ayupp, K., Perumal, A. (2008) Learning Organization: Exploring Employee Perception, *The Icfai University Journal of Organizational Behavior*, 7 (3), 22-33
- Bass, B.M. (1997) Does the Transactional-Transformational Leadership Paradigm Transcend Organizational and National Boundaries?, *American Psychologist*, 52 (2), 130-139
- Bass, B.M. (2000) The Future of Leadership in Learning Organizations, *Journal of Leadership Studies*, 7 (8), 18-40
- Bayraktaroglu, S., Kutanis, R.O. (2003) Transforming hotels into learning organisations: a new strategy for going global, *Tourism Management*, 24, 149-154
- Bishop, D., Felstead, A., Fuller, A., Jewson, N., Lee, T., Unwin, L. (2006) *Connecting Culture and Learning in Organisations: A Review of Current Themes*, Learning as Work Research Paper, 5, 1-38
- Blaikie, N. (2010) *Designing Social Research* (2nd edition), Cambridge, UK: Polity Press
- Bontis, N., Crossan, M., Hulland, J. (2002) Managing an organisational learning system by aligning stocks and flows, *Journal of Management Studies*, 39 (4), 438-469
- Brannick, T., Coghlan, D. (2007) In Defence of Being 'Native': The Case for Insider Academic Research, *Organisational Research Methods*, 10 (1), 59-74
- Brewster, C. (2007) A European perspective on HRM, *European J. International Management*, 1 (3), 239-259
- Brien, A., Smallman, C. (2011) The respected manager ... the organizational social capital developer, *International Journal of Hospitality Management*, 30, 639-647
- Brown, A., Keep, E. (2003) Competing perspectives on workplace learning and the learning organisation, in Nyhan, B., Kelleher, M., Cressey, P., Poell, R. (Eds) *Facing up to the Learning Organisation Challenge – Volume II: Selected European Writings*, Cedefop Reference Series, Office for Official Publications of the European Communities, Luxembourg, 73-91

- Brown, T. (2008) Design Thinking, *Harvard Business Review*, June 2008, 84-92
- Brown, T. (2009) *Change by Design*, New York, NY: Harper Collins Publishers
- Brownell, J. (2008) Exploring the Strategic Ground for Listening and Organizational Effectiveness, *Scandinavian Journal of Hospitality and Tourism*, 8 (3), p. 211-229
- Bryman, A. (2008) *Social Research Methods* (3rd edition), New York: Oxford University Press
- Chan, C.C.A., Scott-Ladd, B. (2004) Organisational learning: Some considerations for human resource practitioners, *Asia Pacific Journal of Human Resources*, 42 (3), 336-347
- Chang, S.C., Lee, M.S. (2007) A study on relationship among leadership, organizational culture, the operation of learning organization and employees' job satisfaction, *The Learning Organization*, 14 (2), 155-185
- Chen, R., Gheung, C., Law, R. (2012) A review of the literature on culture in hotel management research: What is the future?, *International Journal of Hospitality Management*, 31, 52-65
- Chinowsky, P., Molenaar, K., Realph, A. (2007) Learning Organizations in Construction, *Journal of Management in Engineering*, January, 27-34
- Chiva, R., Alegre, J., Lapiedra, R. (2007) Measuring organisational learning capability among the workforce, *International Journal of Manpower*, 28 (3/4), 224-242
- Chiva, R., Alegre, J. (2008) Emotional intelligence and job satisfaction: the role of organizational learning capability, *Personnel Review*, 37 (6), 680-701
- Chiva-Gomez, R. (2004) The facilitating factors for organizational learning in the ceramic sector, *Human Resource Development International*, 7 (2), 233-249
- CLMS (2003) *Doctorate in Social Sciences*, Module 2 – Option 2C (Version 1). Unit 1-8, Leicester: Centre for Labour Market Studies

CLMS (2004) *Doctorate in Social Sciences*, Module 1 (Version 1.2), Unit 1, Leicester: Centre for Labour Market Studies

Coopey, J. (1995) The Learning Organization, Power, Politics and Ideology Introduction, *Management Learning*, 26 (2), 193-213

Coopey, J., Burgoyne, J. (2000) Politics and Organizational Learning, *Journal of Management Studies*, 37 (6), 869-885

Cordes, K., Ibrahim, H. (1996) Leader or Manager, *The Journal of Physical Education, Recreation & Dance*, 67 (1), 41-44

Crossan, M., Lane, H., White, R. (1999) An organizational learning framework: from intuition to institution, *Academy of Management Review*, 24 (3), 522-537

Davidson, M., McPhail, R., Barry, S. (2011) Hospitality HRM: past, present and the future, *International Journal of Contemporary Hospitality Management*, 23, 4, 498-516

De Geus, A. (1988) Planning as learning, *Harvard Business Review*, 66 (2), 70-74

De Vaus, D. (2001) *Research Design in Social Research*, Los Angeles: Sage Publications

de Villiers, W.A. (2008) The Learning Organisation: Validating A Measuring Instrument, *The Journal of Applied Business Research*, 24 (4), 11-22

Driver, M. (2002) The learning organization: Foucauldian gloom or utopian sunshine, *Human Relations*, 55 (1), 33-53

Drucker, P. (1988) The Coming of the New Organization, in *Harvard Business Review on Knowledge Management* (1998), Boston, USA: Harvard Business School Press

Drucker, P. (1990) The emerging theory of manufacturing, *Harvard Business Review*, 68 (3), 94-102

Dunphy, D., Turner, D., Crawford, M. (1997) Organizational learning as the creation of corporate competencies, *Journal of Management Development*, 16 (4), 232-244

Easterby-Smith, M. (1997) Disciplines of Organizational Learning: Contributions and Critiques, *Human Relations*, 50 (9), 1085-1113

Easterby-Smith, M., Araujo, L. (1999) Organizational learning: current debates and opportunities, in Easterby-Smith, M., Burgoyne, J., Araujo, L. (Eds) *Organizational Learning and the Learning Organization: Developments in Theory and Practice*, London: Sage Publications, 1-21

Easterby-Smith, M., Burgoyne, J., Araujo, L. (Eds.) (1999) *Organizational Learning and the Learning Organization: Developments in Theory and Practice*, London: Sage Publications

Eijkman, H. (2011) The learning organization as concept and journal in the neo-millennial era, *The Learning Organization*, 18 (3), 164-174

Elkin, G., Zhang, H., Cone, M. (2011) The Acceptance of Senge's Learning Organization Model among Managers in China: An Interview Study, *International Journal of Management*, 28 (4), 354-365

Ellinger, A.D., Watkins, K.E., Bostrum, R.P. (1999) *Managers as Facilitators of Learning in Learning Organizations*, *Human Resource Development Quarterly*, 10 (2), 105-125

Ellinger, A.D., Bostrom, R.P. (2002) An Examination of Managers' Beliefs about their Roles as Facilitators of Learning, *Management Learning*, 33 (2), 147-179

Ellinger, A.D., Ellinger, A.E., Yang, B., Howton, S.W. (2003) Making the Business Case for the Learning Organisation Concept, *Advances in Developing Human Resources*, 5 (2), 163-172

Ellinger, A.D., Watkins, K.E., Marsick, V.J. (2005) *Case Study Research Methods*, in Swanson, R.A., Holton, E.F. (2005) *Research in Organisations: Foundations and Methods of Inquiry* (ed.), San Francisco, CA: Berrett-Koehler Publishers, Inc.

Eraut, M., Alderton, J., Cole, G., Senker, P. (1997) The Impact of the Manager on Learning in the Workplace, *Paper given to BERA Conference*, September, 1-12

- Fiol, C.M., Lyles, M.A. (1985) Organizational Learning, *The Academy of Management Review*, 10 (4), 803-813
- Fischer, M. (2003) Challenges and open questions raised by the concept of the learning organisation, in Nyhan, B., Kelleher, M., Cressey, P., Poell, R. (Eds) *Facing up to the Learning Organisation Challenge – Volume II: Selected European Writings*, Cedefop Reference Series, Office for Official Publications of the European Communities, Luxembourg, 33-49
- Flanagan, J.C. (1954) The Critical Incident Technique, *Psychological Bulletin*, 51 (4), 327-358
- Fleetwood, S. (2005) Ontology in Organisation and Management Studies: A Critical Realist Perspective, *Organisation*, 12 (2), 197-222
- Fulcher, J. (2000) Globalisation, the nation-state and global society, *The Sociological Review*, 48 (4), 522-543
- Garavan, T. (1997) The learning organization: a review and evaluation, *The Learning Organization*, 4 (1), 18-29
- Garvin, D.A. (1993) Building a Learning Organization, in *Harvard Business Review*, 71 (4), 78-91
- Garvin, D.A., Edmondson, A.C., Gino, F. (2008) Is Yours a Learning Organization?, *Harvard Business Review*, March 2008, 109-116
- Gaynor, G.H. (2002) *Innovation by Design*, New York, NY: American Management Association
- Gephart, M.A., Marsick, V.J., Van Buren, M.E., Spiro, M.S. (1996) Learning Organization Come Alive, *Training & Development*, 50 (12), 34-45
- Gjelsvik, M. (2002) Hotels as Learning Arenas, *Scandinavian Journal of Hospitality and Tourism*, 2 (1), 31-48

- Goh, S., Richards, G. (1997) Benchmarking the Learning Capability of Organizations, *European Management Journal*, 15 (5), 575-583
- Goh, S.C. (1998) Toward a Learning Organization: The Strategic Building Blocks, *SAM Advanced Management Journal*, Spring, 15-22
- Gorelick, C. (2005) Organizational learning vs. the learning organization: a conversation with a practitioner, *The Learning Organization*, 12 (4), 383-388
- Gould, N. (2000) Becoming a learning organisation: a social work example, *Social Work Education*, 19 (6), 585-596
- Grieves, J. (2008) Why we should abandon the idea of the learning organization, *The Learning Organization*, 15 (6), 463-473
- Harrim, H.M. (2010) Relationship between Learning Organization and Organizational Performance: Empirical Study of Pharmaceutical Firms in Jordan, *Jordan Journal of Business Administration*, 6 (3), 405-425
- Harris, P. (2010) Where People Power Makes the Difference, *Training and Development*, 32-34
- Hendriks, P. (1999) Why Share Knowledge? The Influence of ICT on the Motivation for Knowledge Sharing, *Knowledge and Process Management*, 6 (2), 91-100
- Hofstede, G. (1980) Motivation, Leadership, and Organization: Do American Theories Apply Abroad?, *Organizational Dynamics*, Summer, 42-63
- Hofstede, G. (2001) Culture's Consequences: Comparing values, behaviour, institutions and organisations across nations (2nd edition), Thousand Oaks, CA: Sage Publications
- Howe, N, Strauss, W. (2000) *Millennial Rising: The Next Great Generation*, New York, NY: Vintage Books
- Huber, G.P. (1991) Organizational Learning: The Contributing Processes and the Literatures, *Organization Science*, 2 (1), 88-115
- Hughes, J. (2000) The Learning Organisation Part I, *CLMS Working Paper*, 29, 1-14

- Hughes, J. (2001) "Getting Emotional" The Learning Organisation and Emotional Intelligence, *The International Journal of Applied Human Resource Management*, 2 (3), 12-29
- Hunt, J.G. (1999) Transformational/charismatic leadership's transformation of the field: An historical essay, *Leadership Quarterly*, 10 (2), 129-144
- Jamali, D., Sidani, Y. (2008) Learning organizations: diagnosis and measurement in a developing country context, *The Learning Organization*, 15 (1), 58-74
- Jyothibabu, C., Farooq, A., Pradhan, B.B. (2010) An integrated scale for measuring an organizational learning system, *The Learning Organization*, 17 (4), 303-327
- Keep, E. (2000) Learning organisations, lifelong learning and the mystery of the vanishing employers, *SKOPE Research Paper*, 8 (Summer), 1-18
- Keep, E., Rainbird, H. (2000) Towards the Learning Organization? In Back, S. and Sisson, K. (eds.), *Personnel Management* (third edition), Oxford: Blackwell, 173-194
- Kim, D.H. (1993) The Link between Individual and Organizational Learning, *Sloan Management Review*, Fall, 37-50
- King, N. (2012) Doing Template Analysis, in Simon, G., Cassell, C. (Eds) *Qualitative Organizational Research*, London: Sage Publications, 426-450
- King, N., Horrocks, C. (2010) *Interviews in Qualitative Research*, London: Sage Publications
- Kulesa, P. (2007) The Differentiators of High Performance: Aligning People Strategy with Business Strategy, in Finney, M.I. (2008) *Building High Performance People And Organizations*, Westport, CT: Greenwood Publishing Group, 36-54
- Kusluvan, S., Kusluvan, Z., Ilhan, I., Buyruk, L.. (2010) The Human Dimension: A Review of Human Resources Management Issues in the Tourism and Hospitality Industry, *Cornell Hospitality Quarterly*, 51, 171-191

- Kwortnik, R.J. (2006) Shining Examples of Service When the Lights Went Out: Hotel Employees and Service Recovery During the Blackout of 2003, *Journal of Hospitality and Leisure Marketing*, 14 (2), 23-45
- Lahteenmaki, S., Toivonen, J., Mattila, M. (2001) Critical Aspects of Organizational Learning Research and Proposals for Its Measurement, *British Journal of Management*, 12, 113-129
- Lawrence, T.B., Mauws, M.K., Dyck, B., Kleysen, R.F. (2005) The politics of organizational learning: integrating power into the 4i framework, *Academy of Management Review*, 30 (1), 180-191
- Lee, B. (2012) Using Documents in Organizational Research, in Simon, G., Cassell, C. (Eds) *Qualitative Organizational Research*, London: Sage Publications, 389-407
- Mahoney, R. (2000) Leadership and learning organisations, *The Learning Organization*, 7 (5), 241-243
- Marquardt, M.J. (2000) Action learning and leadership, *The Learning Organization*, 7 (5), 233-240
- Marquardt, M.J. (2011) Building the Learning Organization: Achieving Strategic Advantage through a Commitment to Learning (3rd edition), Boston, MA: Nicholas Baeley Publishing
- Marshall, J., Smith, S. (2009) Learning organisations and organisational learning: What have we learned?, *Management Services*, Summer, 36-44
- Marsick, V.J., Watkins, K.E. (2003) Demonstrating the Value of an Organization's Learning Culture: The Dimensions of the Learning Organization Questionnaire, *Advances in Developing Human Resources*, 5 (2), 132-151
- Mason, J. (2009) *Qualitative Researching* (2nd edition), London: Sage Publications
- McGill, M.E., Slocum Jr., J.W., Lei, D. (1992) Management practices in learning organizations, *Organizational Dynamics*, 21 (1), 4-14

- Moilanen, R. (2001) Diagnostic tools for learning organizations, *The Learning Organization*, 8 (1), 6-20
- Moilanen, R. (2005) Diagnosing and measuring learning organizations, *The Learning Organization*, 12 (1), 71-89
- Mullins, L.J. (2005) *Management and Organisational Behaviour* (Seventh Edition), Harlow, Essex, England: Pearson Education Limited
- Mumford, A. (1995) The learning organization in review, *Industrial and Commercial Training*, 27 (1), 9-16
- Mumford, M.D., Zaccaro, S.J., Harding, F.D., Jacobs, T.O., Fleishman, E.A. (2000) Leadership skills for a changing world: solving complex social problems, *Leadership Quarterly*, 11 (1), 11-35
- Nevis, E.C., DiBella, A.J., Gould, J.M. (1995) Understanding organizations as learning systems, *Sloan Management Review*, 36 (2), 73-85
- Nonaka, I. (1991) The knowledge-creating company, *Harvard Business Review*, November-December, 96-104
- Nonaka, I., Takeuchi, H. (1995) *The Knowledge-Creating Company – How Japanese Companies Create the Dynamics of Innovation*, New York, NY: Oxford University Press
- Nyhan, B., Cressey, P., Tomassini, M., Kelleher, M., Poell, R. (2004) European perspectives on the learning organisation, *Journal of European Industrial Training*, 28 (1), 67-92
- O'Neil, J. (2003) Participant's Guide for Interpreting Results of the Dimensions of the Learning Organization Questionnaire, *Advances in Developing Human Resources*, 5 (2), 222-230
- Ohmae, K. (1999), *The Borderless World: Power and Strategy in the Interlinked Economy* (Revised Edition), New York, NY: HarperCollins Publishers

- Ortenblad, A. (2001) On differences between organizational learning and learning organization, *The Learning Organization*, 8 (3), 125-133
- Ottenbacher, M., Harrington, R.J.. (2007) The innovation development process of Michelin-starred chefs, *International Journal of Contemporary Hospitality Management*, 19, 6, 444-460
- Owenby, P. (2002) Organizational learning communities and the dark side of the learning organization, *New Directions for Adult and Continuing Education*, 95 (Fall), 51-60
- Park, J.H. (2008) Validation of Senge's Learning Organization Model with Teachers of Vocational High Schools at the Seoul Megalopolis, *Asia Pacific Education Review*, 9 (3), 270-284
- Pedler, M., Burgoyne, J., Boydell, T. (1997) *The Learning Company* (2nd ed.), Maidenhead, UK: McGraw-Hill Publishing Company
- Phillips, J.J., Watkins, K.E., Marsick, V.J. (1996) *Creating the Learning Organisation*, Alexandria, VA: American Society of Training and Development
- Popper, M., Lipshitz, R. (2000) Installing mechanisms and instilling values: the role of leaders in organizational learning, *The Learning Organization*, 7 (3), 135-144
- Rebelo, T.M., Gomes, A.D. (2008) Organizational learning and the learning organization – Reviewing evolution for prospecting the future, *The Learning Organization*, 15 (4), 294-308
- Reichers. A.E., Schneider, B. (1990) Climate and culture: an evolution of constructs, in B. Schneider (Ed.), *Organizational climate and culture*, Jossey-Bass, San Francisco, 5-39
- Richardson, B. (1995) Learning contexts and roles for the learning organization leader, *The Learning Organization*, 2 (1), 15-33
- Rizzi, E. 2012 (21 January) Wer die Zeichen der Zeit nicht erkannt hat, Daily Publication, *20 Minuten*

Sayer, A. (2000) *Realism and social science*, London: Sage

Scarbrough, H., Swan, J. (2001) Explaining the Diffusion of Knowledge Management: The Role of Fashion, *British Journal of Management*, 12 (1), 3-12

Schuler, R.S., Jackson, S.E. (ed.) (1995) *Strategic Human Resource Management*, Carlton, Victoria, Australia: Blackwell Publishing Ltd.

Scott-Ladd, B., Chan, C.C.A. (2004) Emotional intelligence and participation in decision-making: strategies for promoting organizational learning and change, *Strategic Change*, 13, 95-105

Senge, P.M. (1990) The Leader's New Work: Building Learning Organizations, *Sloan Management Review*, 32 (1), 7-23

Senge, P.M. (1992) *The Fifth Discipline – The Art and Practice of the Learning Organization*, New York, NY: Doubleday Dell

Senge, P.M. (1996) Leading Learning Organizations: The Bold, the Powerful, and the Invisible, in Hesselbein, F., Marshall, R., Bechkard, R. (eds.) *The Leader of the Future*, New York, NY: Jossey-Bass, 41-57

Senge, P.M. (1999) Learning Leaders, *Executive Excellence*, November, 12-13

Senge, P.M. (2006) *The Fifth Discipline – The Art and Practice of the Learning Organization* (Revised Edition), New York, NY: Doubleday Dell

Senge, P.M., Kleiner, A., Roberts, C., Ross, R.B., Smith, B.J. (1994) *The Fifth Discipline Fieldbook*, London: Nicholas Brealey Publishing Limited

Senge, P.M., Kofman, F. (1993) Communities of commitment: the heart of learning organizations, *Organizational Dynamics*, Autumn, 5-23

Serrat, O. (2009) Exercising Servant Leadership, *Knowledge Solutions*, 63, 1-5

Slater, S.F., Narver, J.C. (1995) Market Orientation and the Learning Organization, *Journal of Marketing*, 59 (3), 63-74

Social Research Association (2003), *Ethical Guidelines* {online}, available at: www.the-sra.org.uk

Song, J.H., Joo, B.K., Chermack, T.J. (2009) The Dimensions of Learning Organization Questionnaire (DLOQ): A Validation Study in a Korean Context, *Human Resource Development Quarterly*, 20 (1), 43-64

Sun, H. (2003) Conceptual clarifications for ‘organizational learning’, ‘learning organization’ and ‘a learning organization’, *Human Resources Development International*, 6 (2), 153-166

Sun, H. (2003) Conceptual clarifications for ‘organizational learning’, ‘learning organization’ and ‘a learning organization’, *Human Resources Development International*, 6 (2), 153-166

Tannenbaum, S.I. (1997) Enhancing continuous learning: diagnostic findings from multiple companies, *Human Resource Management*, 36 (4), 437-452

Teare, R., Bowen, J. T. (1997) Assessing information needs and external change, *International Journal of Contemporary Hospitality Management*, 9 (7), 274-284

Teare, R., Dealtry, R. (1998) Building and sustaining a learning organization, *The Learning Organization*, 5 (1), 47-60

Teare, R., O’Hern, J. (2000) Challenges for service leaders: setting the agenda for the virtual organization, *International Journal of Contemporary Hospitality Management*, 12 (2), 97-106

Testa, M.R. (2007) A deeper look at national culture and leadership in the hospitality industry, *Hospitality Management*, 26, 468-484

The British Psychological Society (2000) *Ethical Principles for conducting Research with Human Participants* {online}, available at: www.bps.org.uk

Tsang, E.W.K. (1997) Organizational Learning and the Learning Organization: A Dichotomy Between Descriptive and Prescriptive Research, *Human Relations*, 50 (1), 73-89

- Tuli, F. (2010) The Basis of Distinction Between Qualitative and Quantitative Research in Social Science: Reflection on Ontological, Epistemological and Methodological Perspectives, *Ethiop. Journal of Education & Science*, 6 (1), 97-108
- Vera, D., Crossan, M. (2004) Strategic Leadership and Organizational Learning, *Academy of Management Review*, 29 (2), 222-240
- Watkins, K.E., Marsick, V.J. (1993) *Sculpting the Learning Organization: Lesson in the Art and Science of Systemic Change*, San Francisco, CA: Jossey-Bass
- Watkins, K.E., Marsick, V.J. (1996) *In Action: Creating the Learning Organization*, Alexandria, VA: American Society for Training and Development
- Watkins, K.E., Marsick, V.J. (1997) *Dimensions of the Learning Organisation Questionnaire* (Survey), Warwick, RI: Partners for the Learning Organisation
- Watkins, K.E., Marsick, V.J. (2003) Summing Up: Demonstrating the Value of an Organization's Learning Culture, *Advances in Developing Human Resources*, 5 (2), 129-131
- Weiss, L. (1999) The Limits of Globalization, Chapter 6 of *The Myth of the Powerless State: Governing the Economy in a Global Era*, Cambridge: Polity
- Wong, S., Pang, L. (2003) Motivators to creativity in the hotel industry – perspectives of managers and supervisors, *Tourism Management*, 24, 551-559
- Yang, B. (2003) Identifying Valid and Reliable Measures for Dimensions of a Learning Culture, *Advances in Developing Human Resources*, 5 (2), 152-162
- Yang, B., Watkins, K.E., Marsick, V.J. (2004) The construct of the learning organization: dimensions, measurement, and validation, *Human Resource Development Quarterly*, 15 (1), 31-55
- Yang, C., Wang, Y, Niu, H. (2007) Does Industry Matter in Attributing Organizational Learning to its Performance?: Evidence from the Taiwanese Economy, *Asia Pacific Business Review*, 13 (4), 547-563

- Yang, J. (2004) Qualitative knowledge capturing and organizational learning: two case studies in Taiwan hotels, *Tourism Management*, 25, 421-428
- Yang, J. (2009) Individual attitudes to learning and sharing individual and organisational knowledge in the hospitality industry, *The Service Industries Journal*, 29 (12), 1723-1743
- Yin, R.K. (2009) *Case Study Research: Design and Methods* (4th edition), Thousand Oaks, CA: Sage Publications
- Yin, R.K. (2012) *Applications of Case Study Research* (3rd edition), Thousand Oaks, CA: Sage Publications
- Zaleznik, A. (1992) Managers and Leaders: Are They Different?, *Harvard Business Review*, 70 (2), 126-135