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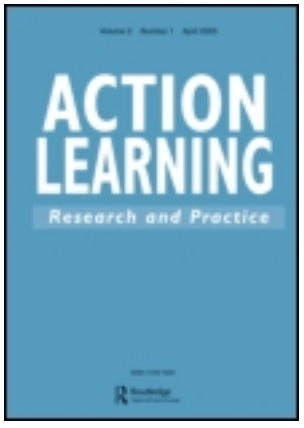

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Leadership development in SMEs: an action learning approach

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Leadership development in SMEs: an action learning approach

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In this paper we evaluate an action learning-based, leadership development programme designed for founders and leaders of growth-oriented, entrepreneurial small to medium-sized enterprises. Based on in-depth, qualitative interviews with participants on one cohort, undertaken two years after completion of the seven-month programme, we demonstrate that by viewing action learning as an ethos that informs practice, it can contribute to the process of effective leadership development with identifiable personal and business outcomes.

Keywords: action learning; leadership; small firms; evaluation

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Introduction

While there may be no agreement as to what 'leadership' is, despite over 50 years of quantitative and qualitative research (Bryman 2004), there is a widespread consensus that it is important and that it is situational. Most leadership research has been situated in corporate contexts and there has been much less attention given to issues of leadership and leadership development in the context of small and medium-sized enterprises (SMEs) (Coglister and Brigham 2004; Vecchio 2003). For some, this is not problematic: for example, Vecchio (2003) argues that entrepreneurship is simply a type of leadership that occurs in a specific setting, that is, the entrepreneurial or small business is the situation and, as such, available leadership theory can be applied to understanding it. For others, the study of entrepreneurs as leaders is a gap in both the leadership and the entrepreneurship literatures (Jensen and Luthans 2006, 650) – 'exploring the founder/entrepreneur of a small emerging firm as a leader has yet to be a major area of study' but it is one that has implications for our understanding of new venture viability and growth.

There are, however, specific issues in the SME context that suggest leadership development needs to be conceptualised differently from that in the corporate context. For instance, in the SME there is rarely a clear separation between leadership and managerial responsibilities (Eggers and Smilor 1996; Stewart 2009). Nevertheless, entrepreneurial settings provide a venue, in terms of being characterised by highly organic, non-formalised simple structures (Mintzberg 1979), where the impact of leadership is likely to be most pronounced (Daily et al. 2002). However, the higher likely impact of leadership in this setting is matched by greater difficulty in developing that leadership. Indeed, there may often be a conflict between leadership development and the SME situational context. This is because SMEs tend to be influenced by dominant individual(s), who are associated with a lack of flexibility, engagement, openness and responsiveness, whereas leadership development requires reflection and feedback in safe environments if lessons are to be learnt and individuals are to develop. In this paper we examine the process of leadership development in such a context to determine the extent to which a new conceptualisation of entrepreneurial leadership is required.

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We do this be analysing an action learning-based leadership development programme targeted at founders and leaders of growth-oriented or entrepreneurial small to medium-sized enterprises. This is in the context of a general paucity of studies on the critical evaluation of action learning approaches in the development of SMEs (Clarke et al. 2006; Stewart 2009). As we will demonstrate, an action learning approach makes an important contribution to the development of leadership, not least in the way it encourages challenge, critical reflection and a consideration of self and identity.

By way of providing an exemplar of the benefits of adopting action learning as a mechanism for leadership development, we present and discuss the results from Phase 1 of an ongoing research project into the effectiveness of leader and leadership development. The paper is structured as follows. First, a number of key developments in contemporary leadership studies are reviewed, with specific reference to the needs of leaders in SMEs. Second, we provide a brief synopsis of the underlying principles of action learning that have informed the design of the open-access programme under consideration. Third, a summary of this programme, which specifically incorporates an action-and-implementation oriented approach to leadership development, among founders and leaders of entrepreneurial companies, as well as organisational improvement, is presented. Fourth, based on qualitative interviews of a number of participants on this programme, we demonstrate how by viewing action learning as an ethos that informs practice, its adoption can contribute to the process of effective leadership and organisational development within an enterprise. Fifth, we draw out some conclusions for the adoption and refinement of an action learning approach to leadership development in SMEs. Sixth, we develop a framework for the further analysis of entrepreneurial/SME leadership as a guide to future research in this area.

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Leadership

In a progressively more turbulent, complex and dynamic business environment successful leaders and effective leadership are increasingly viewed as sources of competitive advantage (Küpers and Weibler 2008; Yukl 2008). This is because there is an implicit assumption that leadership is important, that leaders will actually make a difference and that positive group and organisational effects are produced by leaders and the leadership process (Pierce and Newstrom 2000). As a result there has been significant investment in this area: for example, in 2005, the estimated expenditure in the UK was around £120 million (Benchmark Research 2006) and globally US$15–50 billion (Arts Council England 2006; Rockwood Leadership Institute 2006). In view of the significant resources allocated to this activity in the UK, by both government and organisations, it is important to evaluate the impact of any leadership development initiative. Despite this, there has been little comprehensive assessment in the area, which means our knowledge about it remains limited. For instance, there is little agreement on what counts as leadership, if it can be developed, how theories about leadership can be translated into effective practical applications or even how effective these might be (Almio-Metclafe and Alban-Metcalfe 2005; Iles and Preece 2006).

The lack of consensus about leadership development can be partly explained by a number of key factors that are evident in the extant literature (Collinson and Grint 2005; Grint 2007). First, much research has been based on the North American experience (Alimo-Metcalfe and Alban-Metcalfe 2005; Bryman 2004), which is different in scale and context from other regions and, thus, calls into question the transferability of concepts and practices. Second, there has been a tendency to focus on the development of the leadership capabilities of middle and upper-middle managers but not those in senior positions (Iles and Preece 2006). Third, few studies have been conducted in a SME context (Morrison 2003). Those that have suggest that the impact of leaders and leadership is a crucial factor in the success or failure of small

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firms (Council for Excellence in Management and Leadership 2002; Morrison 2003). Thus, understanding leadership development in this context is particularly pertinent in the UK and especially in Northern Ireland, where SMEs dominate the economy (Business, Enterprise and Regulatory Reform 2008). Fourth, most research has been based on quantitative studies in which a pre-developed, behaviourally-based leadership assessment tool has been used (Bryman 2004; Hunter, Bedell-Avers, and Mumford 2007). Such a method is limited in that only static, backward looking and broad perspectives tend to be obtained (Denzin and Lincoln 2005). However, leadership development is a complex social phenomenon comprising different activities, events and exchanges over time and in different contexts (Hunter, Bedell-Avers, and Mumford 2007). In other words, this more constructionist view emphasizes the need for interventions in leadership development to be understood in context and as situationally embedded, in contrast to the behaviourist emphasis on observable traits and behaviours. It is exactly this contextualization and embedding of the leadership development process that action learning approaches have the potential to do. Fifth, while there have been a number of studies of entrepreneurial leadership these have taken the form either of general, non-empirical reviews of the field (Cogliston and Brigham 2004; Vecchio 2003) or empirical studies of middle-level executives with corporate entrepreneurship as the intellectual context (Gupta, MacMillan, and Surie 2004).

The qualitative research reported in this paper seeks to address some of these issues in that it was conducted in an SME context in Northern Ireland using in-depth, semi-structured interviews to access the perceptions of leaders on an action learning-oriented, leadership development programme specifically designed to address the needs of leaders of growth-oriented entrepreneurial companies. Leadership development within an entrepreneurial context potentially faces different challenges from that in a corporate setting: 'I'm convinced that the way of life of a small firm is so different from the culture of the medium-sized or large organisation that the management manual has little to say of relevance, and even less that is acceptable, to the small business' (Inglis 1994, as cited in Stewart 2009, 135). For instance, Perrin and Grant (2001) have argued that to understand the needs of owner-managers and leaders of SMEs one must not only be aware of their settings but to also design programmes and interventions that serve their needs and mirror their realities. Leaders of such businesses frequently emphasize their isolation and without peer and role models, who tend to be more evident in larger organisations, the need to interact with others in similar situations is magnified (Institute for Entrepreneurship and Enterprise Development 2007; Perren and Grant 2001).

Action learning

Even though action learning was first introduced into management education and development over 50 years ago (Raelin and Raelin 2006) and became a recognised innovation in such activities in the UK in the mid-1970s, interest in it since has 'waxed and waned without it either becoming widespread or disappearing' (Pedler, Burgoyne, and Brook 2005, 49). Further, its use seems to be more apparent among the practitioner community, rather than in academia, where it is mainly employed on postgraduate or post-experience programmes and less on undergraduate programmes, where there still appears to be more reliance on traditional methods of education and learning. Extensive adoption of this approach to education might be inhibited by its lack of definitional or conceptual clarity: as Weinstein (1995, 32) has noted 'it means different things to different people'. Indeed, Revans eschewed a single definition of action learning, preferring instead to clarify what it was not. However, as Simpson and Bourner (2007, 175) have observed, opinion is divided as to whether this has been to the advantage of action learning, with some commentators arguing that the absence of a definition has retarded its growth and development, while others assert that it is more important to focus on its underlying philosophy

or ethos rather than on its practice. This, they suggest, has protected it from becoming either a fad or 'flavour of the month' with the transience that implies. It remains the case, however, that action learning's emphasis on 'learning-from-action' and 'acting-from-learning' has been somewhat at odds with the prioritisation of theoretical foundations in university education since the 1960s (Fox 2009). While there has been a burgeoning literature on learning in organisational contexts (Dierkes et al. 2001) this exists entirely separately from the action learning tradition. Some commentators recognise this: 'There is evidently quite a gap between conceptual discussion of organizational learning and day-to-day managerial action within organizations. That gulf need not persist, however' (Pawlowsky et al. 2001, 775). Notwithstanding this, these commentators continue to argue that 'practical tools of organizational learning can be grounded in a theoretical framework that can facilitate their selection and appropriate use' (775). Even though this may support what Fox (2009) refers to as 'learning-in-action' it does not describe the distinctive focus in action learning on learning-from-action.

The fact that action learning can be considered to be an idea in evolution that might not be clearly understood or recognised raises implications for both research and practice. Indeed, definitional imprecision may actually inhibit inquiry into its nature and practice. As Pedler, Burgoyne, and Brook (2005, 52) have observed, 'the prime difficulty in researching action learning is the lack of an agreed definition'. This is because it is clearly more complicated to try to gain insights into a phenomenon if there is no, or little, sense of what it is. With respect to the practice of action learning. Pedler, Burgoyne and Brook (2005) have noted that in comparison with Revans' (1983) 'classical principles' there have been significant departures and evolutions. This is perhaps not surprising given that action learning is a context-specific teaching and learning method that develops and takes new forms in response to different situations and scenarios. It is, therefore, difficult to fix or succinctly define what action learning is or looks like. However, despite the variations in its practice Pedler, Burgoyne and Brook (2005) found, on the basis of research conducted into action learning activities in the UK, there was broad agreement on its key features or principles. This led them to distinguish between action learning as a method, with defined and discernable processes, and action learning as an ethos, a set of abstract principles that are not attached to any particular form of implementation. Specifically, from this latter perspective, action learning is considered to be 'a general approach to learning from engaging with actual work challenges' (Pedler, Burgoyne, and Brook 2005, 58). Further, they note this viewpoint has been most widely disseminated among those involved in management education and development, not least because of the flexibility it affords in the design and development of action-oriented learning activities. We view action learning as an ethos and, in an attempt to gain increased understanding of the impact that this might have for practice, we adopt Simpson and Bourner's (2007) advice to offer the definition that has informed our thinking. This, they argue, helps to clarify similarities and differences and the reasons for those. In so doing it elucidates what we understand by the term and should assist in making sense of our research findings and interpretations. Thus, we have followed Jacobs' (2008, 222) definition of action learning as we feel that it encapsulates best the principles that have informed the design of the particular programme under considertaion: 'Action learning is an approach to shared human learning and development with very basic principles: action and reflection. With the support of a small group (a 'learning set') of peers/colleagues, it is a process of reflecting on, and making sense of, past events and behaviours and identifying action that can be taken, or new ways of behaving, at future events/activities'.

Principles of action learning: from ethos to implementation

While there appears to be a close link between learning and entrepreneurial achievement there is less understanding with respect to the process of how entrepreneurs or leaders of SMEs learn

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(Harrison and Leitch 2008). Within an entrepreneurial context many commentators have suggested learning by experience and discovery is the preferred method of knowledge creation (Dalley and Hamilton 2000; Deakins and Freel 1998; Rae and Carswell 2001). A great challenge therefore faces academics and providers of management education to develop curricula and modes of delivery that not only stimulate but also facilitate such learning. In developing any intervention it is important that 'designers of learning experiences ... understand better what a particular method will offer and what it will not, because otherwise they become visitors of their own limited experience or the victims of the experiences of others' (Mumford 2006, 69). Accordingly, it is advisable to analyse carefully what specific learning methods are most appropriate in meeting the needs of particular participants. In the case of adult learners Knowles (1973, 43) has observed, 'frequently the learner is self-directed but has a conditioned expectation to be dependent and to be taught'. This can lead to tension in programme design between addressing participants' needs and expectations as well as the educational aims and objectives of a particular programme. 'Self-directed' implies that an individual is able to accurately identify his/her own learning needs, which frequently may not be the case. One means by which to overcome this challenge is through designing an integrated approach to learning that combines both formal inputs with an opportunity to engage with practice.

Action learning can provide such a framework as it allows for theoretical contributions and insights to be balanced with the chance to draw on practical experience and application. In advancing his concept Revans (1983) identified two types of learning, P and Q. On the one hand, P representing programmed knowledge, including facts, theories and problems with known solutions is associated with traditional, didactic passive approaches to knowledge acquisition. On the other, Q emphasises the ability to ask penetrating questions about problems for which there are no known solutions as well as identifying action plans to address these. Thus, it is more aligned with the ideologies underpinning alternative learning perspectives, which stress the importance of action in learning, that is, learning by implementing and reflecting upon the application of different solutions to a problem or issue. While Revans (1983) expressed this type of learning as, L (learning) = P (programmed knowledge) + Q (questioning insights), Mumford (2006) observes that perhaps this does not express the most appropriate position of Q. He, therefore, provided a revised equation Q1 + P1 + Q2 ... = L, which he believes not only emphasises the importance of Q but also articulates more clearly that learning is a continuous, iterative process (Mumford 1991). Further, the inclusion of both P and Q in a learning scenario recognises that principles and theories can become more meaningful when they are deliberately introduced into practice, instead of being presented in an isolated lecture setting that excludes reference to experience (Raelin 1994).

This shift in emphasis from a classroom-based, transmission model of teaching and learning, in which the lecturer/teacher chooses the material to be delivered to the passive student, to a constructionist one, where a student actively constructs his/her own learning by deciding what is relevant for them and making sense of it, necessitates designing events and processes that facilitate deep learning. For instance, this can be achieved by incorporating different experiences, such as peer-learning, to enable a student to connect new information to past knowledge in a meaningful and relevant way (Harrison and Leitch 2005). Specifically, in the context of business and management education Revans believed that the learning process commenced with posing insightful questions of work-based problems in order to guide research on the issues identified as well as the formulation of various solutions (Margerison 2005). Further, he believed that individuals learn with and from each other. This emphasis on peer-learning, which is fundamental to action learning, is consistent with Knowles' (1973) view that within a group situation adults are each others' richest learning resources due to the variety of knowledge and skills that each learner has. This is consistent with an emerging consensus in the

entrepreneurial learning literature that stresses the social dimensions of entrepreneurial learning through co-participation (Taylor and Thorpe 2004), the development of learning networks (Florén and Tell 2004), the emergence of cooperative peer groups (Reason 1999) and through relationship-based social learning (Rae 2004, 2005).

Within a management development setting one means by which this can be made more explicit and formalised is by deliberately incorporating opportunities for participants to share specific problems with others in a similar situation. In action learning this is achieved within a group or set of individuals who either facilitate each other or are assisted by a facilitator, through questioning, to identify solutions and actions. Learning occurs from reflection upon the actions taken. While current practice tends to restrict membership size of sets to around six, Pedler, Burgoyne and Brook (2005) note that, for Revans, size was irrelevant as he used the word to describe a relationship. Further, as he viewed sets to be part of a wider network of sets within an organisation he did not consider them to be stand-alone entities. Another departure from classical action learning is the use of a set facilitator. Revans did not endorse the use of full-time facilitators but rather recommended that initiators or 'accouchers' should help to establish the set and once this has been achieved then depart (Pedler, Burgoyne, and Brook 2005).

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Leadership development programme

The action learning-based, leadership programme in this research study runs for a seven-month period and is targeted at owner-managers and leaders of growth-oriented SMEs with a minimum turnover of £1 million and/or around 15–20 employees. The overall aim of the programme is to assist leaders of entrepreneurial small companies to acquire the knowledge, skills and awareness that will enable them to develop themselves and their organisations through the creation of vision and values. The emphasis on leadership, establishing and articulating a vision as well as values, developing strategic awareness and building a team are all issues, which have been identified by Kouzes and Posner (2007) as being important in developing good leaders. Specifically, the five leadership practices highlighted by Kouzes and Posner (2007) can be described as follows:

(1) Model the way – leading by example (models of behaviour expected of self and others; clarification of values);
(2) Inspire a shared vision – painting a clear picture for all to see and understand (visions and dreams of the organisation's future; belief and confidence to achieve ambitions; importance of dialogue to share their vision);
(3) Challenge the process – change from the status quo and innovation (new product, service etc.; continual search for opportunities to innovate and improve; creation of an appropriate climate do achieve this; importance of risk and uncertainty);
(4) Enable others to act – team effort required to achieve a vision (building trust and strong relationships, fostering collaborations of all stakeholders; different type of leadership required);
(5) Encourage the heart – importance of recognizing contribution (importance of showing appreciation; creating a culture of celebrating values and victories; visibly and linking rewards with performance).

These five leadership practices are developed across the seven modules on the programme and are reinforced in one-on-one coaching sessions and in facilitated action learning sets (Table 1).

The course was specifically designed to meet two objectives: first, to develop and enhance the leadership capabilities, through changing attitudes and behaviours, of owner-managers

Table 1. Mapping the five practices to each module.

	Module 1: Understanding yourself	Module 2: Understanding others	Module 3: Leadership and management	Module 4: Strategy development	Module 5: Coaching and delegation	Module 6: Performance management	Module 7: Self-development
Model the way	X	X	X	X			X
Inspire a shared vision			X				
Challenge the process				X			
Enable others to act		X			X		X
Encourage the heart	X	X	X	X	X	XX	X

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and leaders to allow them to cope in a progressively more turbulent, complex and dynamic business environment; and, second, using this as a basis for, and stimulus to, effective organisational development and transformation. The development of new behaviours that are the visible expressions of attitudes, beliefs and values is closely connected to an individual reviewing his/her values and assumptions underlying his/her current leadership practices as well as uncovering any contradictions and paradoxes that may exist (Rimanoczy and Brown 2008). The leadership development programme was thus designed around a structured action learning process that supports individual and group learning as well as encouraging critical reflection and practical discussion. Further, throughout the programme opportunities to observe and learn from others, including facilitators and peers, was maximised. Action and reflection is taken on real-time interventions to current workplace challenges and experimentation with different approaches and behaviours is encouraged. An extended view of the learning arena was adopted in that the programme was structured to include both residential-based sessions, which focus on introducing theoretical concepts and insights, with action learning and work-based practice (Jacobs 2008). The programme comprises 27 days of formal contact time with facilitators and coaches. While it is widely recognised that SME owner-managers or leaders are time constrained, and this limits the extent to which they are prepared to engage in significant management development activity (Leitch 2007), this appears not to have been a restriction for the participants on this programme. This suggests that participation in, and a sense of value created by, such programmes is significantly influenced by their design. One participant very clearly indicated both his concern about the time commitment required and his realisation that it could be managed:

> I think that the biggest thing that I noticed was getting away from the business. Because of the fact that it was a residential, far away, that was the biggest challenge for me. (Alan)

He went on, later on in the interview, to articulate that in fact 'it was very, very easy. I had a very strong management team'. This realisation that having a strong management team made it possible to take time out from the business was a significant learning outcome for this participant, who could begin to see the possibility of disengaging the person and the business to the benefit of both.

The programme is structured as follows: first, it is organised around seven two-day residential workshop sessions, the content of which is developed for the specific and unique context of SMEs. Second, within each workshop content and delivery are required to be integrated closely with each participant's personal and organisational situation. Third, each session finishes with an agenda-setting exercise in which participants are required to identify, either at a personal or

organisational level, how and when they would act on and apply the lessons they have learnt from the session. Fourth, between each formal session, participants engage in half-day one-on-one coaching sessions with a trained coach and start to work towards achieving the action points they have identified at the end of each formal session. In such a relationship the participant is guided, through a range of methods, towards achieving this particular goal or objective. Some coaches may adopt a questioning style to facilitate participants to identify an issue as well as a course of action and also to distil any lessons that might be learnt. This is the style of coaching employed on this programme. Such a format, Simpson and Bourner (2007) observe, might be considered similar to action learning, especially auto-action learning, which is defined as 'the repeated discipline of holding oneself to account for actions against a set of questions' (Pedler, Burgoyne, and Brook 2005, 60–61). However, they caution that not all examples of coaching are action-centered but instead can take the form of didactic, expert-led sessions, where the role of the coach is to provide instruction or advice as an expert in a particular subject (see Figure 1). Fifth, participants are further encouraged to commit to action on these agendas by reporting back to their peers at subsequent workshop sessions. Sixth, between each coaching session, participants meet in each other's businesses in an action learning set that is designed to allow one participant individual to benchlearn from his peers. Thus, the 'host' (the owner-manager or leader of the particular organisation) identifies a problem or issue to be addressed and facilitated by the programme leader, his/her peer group provide suggestions and insights as to how it might be addressed. Responsibility for identification of both the issue and action rests with the host and it is this emphasis on personal responsibility that, Simpson and Bourner (2007) suggest, makes action learning sets safe places for learning.

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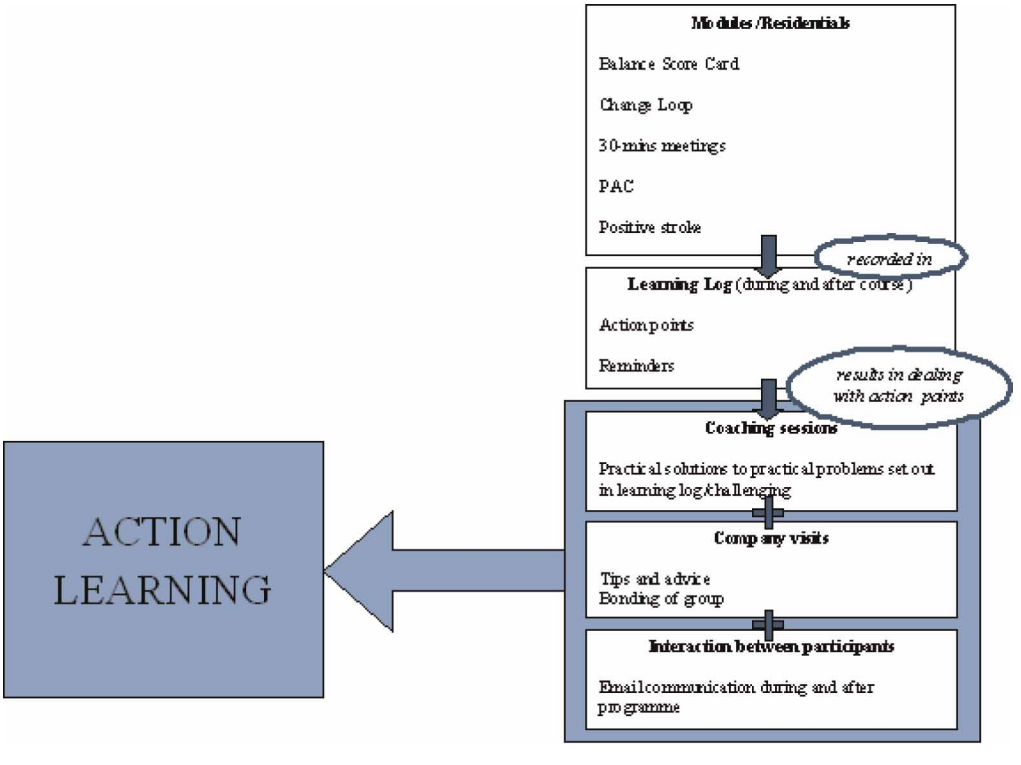

Figure 1. Leadership programme and structure.

This is because, depending on the level of safety and support that an individual feels exists in a group, s/he can decide if and when they want to take the sort of risks that can lead to significant learning (Rogers and Freiberg 1994). At the end of these company visits the rest of the group are required to report on progress to date on their own agendas. Seventh, each participant is encouraged to maintain a reflective learning log both throughout the duration of the course, as well as post-programme. Overall, this programme is designed on two fundamental principles: first, the importance of an action orientation in all elements; and, second, a commitment to reflective learning and practice. All of this takes place in a learning environment that is designed and managed in a way that builds trust among the participants.

Research design and process

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While many management development courses and programmes have adopted action-learning strategies, little evaluation of these interventions has been conducted apart from obtaining immediate feedback at either the end of a session or the entire course (Jacobs 2008). However, such assessment can be problematic as the knowledge gained tends to be limited to the immediate experience of the participants to that particular moment and does not necessarily capture reflection and change. In addition it is often difficult to interpret data generated appropriately due to the absence of contextual and more in-depth information. Further, as Powells and Houghton (2008) note, the short-term impact of a learning intervention can be unpredictable and thus it is important to determine longer-term impacts at any level that are fundamental to an organisation's success. Accordingly, as the aim of this study was to access the perceptions of participants of the extent to which participating on a specific leadership programme met their personal and business objectives, we interviewed one cohort two years after they had completed the programme. This provided opportunity for post-programme reflection and consideration.

In order to give 'voice' to participants' perception and experiences, a qualitative methodology founded on the interpretive tradition was adopted (Leitch, Hill, and Harrison 2010). Such an approach allows a researcher to carefully and thoroughly capture and determine how people experience a phenomenon '– how they perceive it, describe it, feel it remember it, make sense of it and talk about it with others' (Patton 1990, 104). Specifically, in-depth semi-structured interviews, typically lasting between 90 minutes and two hours, were used, which encouraged participants to give detailed accounts of their own experience in what are essentially 'guided' or 'extended' conversations (Rubin and Rubin 2005). In such research the researcher plays an integral role as s/he is the main instrument for both data collection and analysis. In order to obtain access to participants' perceptions and experiences the establishment of a relaxed relationship is vital, with the researcher acting more as a confidante than an interviewer, to the participant. Participants were prompted, therefore, to explore their perceptions of the effectiveness of an action learning oriented, leadership development programme. Issues considered included, but were not confined to, the following:

- leaders' motivations for, and expectations of engaging in, leader and leadership development;
- leaders' perceptions of the effectiveness of learning opportunities provided on the course;
- leaders' perceptions of any changes in their attitudes and/or behaviours towards leadership; and
- leaders' perceptions of any changes in business performance, both economic and non-economic.

The data generated were analysed inductively using a computer software package (NVivo). Analysis of the interview transcripts, both through the researchers' immersion in the data and

structured analysis, were organised around these four core sets of issues. It is this combination of immersion and analysis that allows the interpretivist researcher to signal the quality, validation and trustworthiness of the research process and the data it generates (Leitch, Hill, and Harrison 2010). Such an approach does not set out to test hypotheses but aims to produce an understanding of the social context of a phenomenon and its process (Rowlands 2005). Thus, it is important that the researcher achieves this by thoroughly capturing individual's perceptions and experiences of a phenomenon as well as accessing the meanings they assign to them. Bearing in mind that there is no right or wrong construction the onus rests with the researcher to produce an understandable and sincere account of the analysed phenomenon (Andrade 2009).

In the remainder of this paper our primary focus is to determine the effectiveness of an action learning-based leadership development programme. As such, we examine a number of sub-areas: participants' motivations for joining the programme and their expectations of the outcomes; the effectiveness of different elements of the programme; and reported outcomes from the programme as they relate to its effectiveness. However, we do not present a comprehensive analysis of the impact of the programme on the leadership practices of the participants, which will be the focus of Phase 2 of this ongoing research project.

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Findings

Participants were drawn from one cohort of business leaders on the leadership development programme described above, which was offered in 2007 (see Table 2). Our study included all six participants on the cohort: while this was smaller than the typical cohort (10–12 participants) it met the requirements for this study, which was to focus on post-programme reflection and evaluation.

There is a high level of homogeneity in the profile of the participants: they are all male, in their thirties, mostly educated to university level and mostly holding a majority ownership stake in their business. The businesses are all small to medium sized: four are family businesses; average turnover is around £4.5 million (with one significantly larger business) and average employment is around 70. In other words, these businesses are considerably larger than the minimum criteria set for joining the programme. Given their size, it is likely that these businesses, unlike the much smaller businesses that are ostensibly the target of this programme, will have some sort of management team in place that makes it possible for the owner/leader to devote the time necessary to benefit from this programme. However, the homogeneity of the participants

Table 2. Profile: participants and companies.

Name	Sex	Age band	Highest educational qualifications	Title	Turnover (£m)	Ownership stake (%)	Family business	No. of full-time employees	Sector
Alan	M	36–40	HND	Director	4.1	47.9	No	60	IT
Brian	M	36–40	MBA	Director	4.5	50	No	20	Retail (leisure)
Clive	M	36–40	MSc	Managing Director	3.5	66	Yes	120	Care homes
David	M	31–35	BSc	Managing Director	12.3	0	Yes	90	Retail (catering)
Edwin	M	31–35	None	Director	5	50	Yes	50	Engineering
Frank	M	36–40	BSc	Contracts Manager	3	50	Yes	60	Recycling

does raise an issue about the likely effectiveness of the peer-to-peer action learning design of the programme. On the one hand, this is likely to make the identification of commonalities and shared experiences easier as there are fewer differences to negotiate. On the other hand, the reduction of diversity in the group reduces the opportunity to learn from a wider range and variety of experiences, backgrounds and perspectives. Instead of being challenged through the action learning process, therefore, participants may experience the development of homophily in action learning sets, where they pattern their behaviour on that of the group (Reuf, Aldrich, and Carter 2003).

Motivations and expectations

For most participants the stimulus to joining the programme was an outcome of the growth of the business and the challenges that posed and specifically their desire to learn from others who were facing similar challenges. As one participant expressed it, reflecting Mintzberg's (1979) discussion of the 'unstructured organisation':

> We were growing the business. I wanted to talk to people who had growing business, their plan, etc. . . . As a family business as well, we don't have a HR professional, accountancy professional, etc. . . . or we didn't at the time, I wanted to see whether or not other businesses had these professionals and whether we needed them to keep growing the business myself. I wanted to know what they would bring to the business, so that I could recruit the right people. (Clive)

For others, the reason for participation was to develop their networks in order to learn from others, confirming the importance of the social dimension to entrepreneurial learning (Gold and Devins 2002) as well as to identify business opportunities:

> I felt that I could gain a lot from the other people on the . . . course, I felt that I could gain that networking, group scenario, I felt I could gain more from that than the actual lectures and that was the case. (Alan)

> [My friend] convinced me it was a good idea. I had done the MBA in 93/94 and he convinced me it was a good idea for networking. (Brian)

Personal as well as business considerations were relevant for some of the participants. One particular respondent felt that what prompted his interest in the course at that time was a change in him:

> It was a change in myself to be honest with you. We'd come off the back of doing a lot of in-house production process and all that there, which is very much closed door and I wanted to do something that got me into different circles and looking at something completely different, and we were starting to develop the business plan for the next three years and I wanted to look at it from a different angle. And that got me into that. (Edwin)

What is interesting about this motivation is that it demonstrates recognition of the importance of self-knowledge in the development of effective leadership (Blum 2009; Heifetz and Linsky 1994). This increased knowledge of self supports greater personal development and leadership effectiveness (Bennis 1994). However, Edwin's comment also makes clear the impossibility in practice of completely disentangling the personal and the business. While this individual's reason was clearly personal the elaboration of this is couched almost entirely in terms of the needs of the business.

All participants came to the programme with a range of expectations as to the business and personal outcomes that they expected (see Figure 2). In terms of business expectations, to the extent that they specifically expressed them, they were looking for guidance to deal with a growing business, to look at things differently and identify business weaknesses:

> No real expectations. [The programme leader] had explained what it was about. It was just an opportunity to look at things differently. (Frank)

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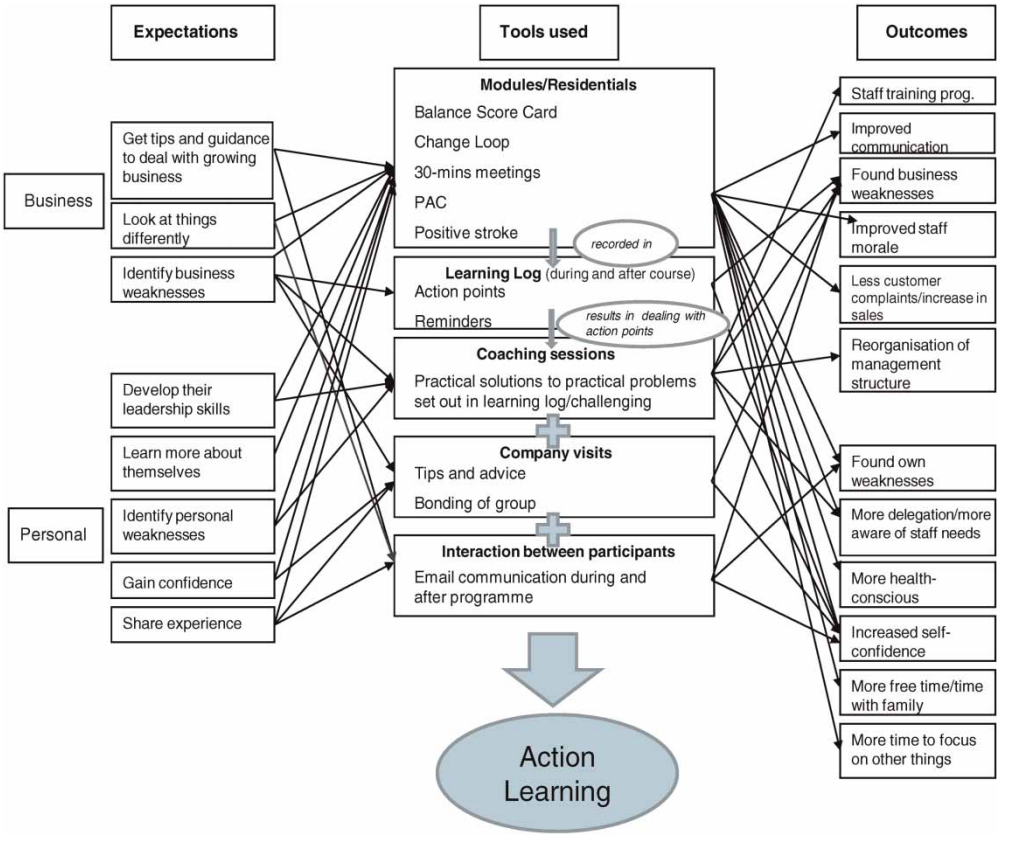

Figure 2. Leadership programme participant's expectations and outcomes.

> I did not have any expectations because I wanted to expose myself to something different. I was quite apprehensive because I would not be the type to talk about my business. It's NI old school 'Tell them nothing'. I wanted more competence in networking and take a look at our business form a different side. It surpassed all of that. (Edwin)

In terms of personal expectations participants expected to develop their leadership skills, learn more about themselves, identify personal weaknesses and share experience:

> I expected guidance, to learn new skills. (Clive)
>
> To develop my own skills and to become a better leader in the organization. (David)
>
> To identify weaknesses both personal and in the business, I think I was aware of the strengths of the business, it's always easier for someone else to show you your weaknesses. (Clive)

What is interesting, across both personal and business expectations is that participants make no reference to a perceived need to change either attitudes or behaviours. While this may be implied by their emphasis on getting tips and guidance and developing leadership skills the clear impression from our interviews is that participants are coming with a strong interest in high-level, even abstract, issues of personal and business development (e.g., looking at things differently, learning more about themselves, gaining confidence) rather than a focus on the actions necessary to deal with their business challenges. This confirms the tension that can exist in programme design between addressing the expectations of participants and meeting the design requirements of a programme (Knowles 1973). Given this, an action learning-based

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programme design can effectively combine the inputs required to stimulate self-learning and self-development and the context within which effective personal action and business development.

Effectiveness

Participants have a very clear view of the extent to which to the action learning ethos of the programme was effective. All identified the coaching sessions as being particularly beneficial. As one participant expressed it in answer to the question 'what was the most effective element of the course?':

> The mentoring. The challenging, I call it instead of mentoring. . . . That made me think about how I was behaving in the business, I would have been letting people do what they want, but letting people perform not to the best of their abilities and we did by stealth if you like, in a way. (Alan)

There was a consensus that the course had provided them with a way to look at their business from a different point of view. What they seemed to enjoy about the coaching sessions was the fact that they were challenging about themselves and the company as a whole:

> [The coach] was very challenging of what I was doing and the other individuals' performance in the company. (Alan)

Some of the participants highlighted the importance for them to be able to open up to the coach in order to allow them to get to know their business. One or two respondents felt that they perhaps could have been pushed a little more during these coaching sessions, although they admitted that their expectations of these exercises might have been different to those of the coach:

> I think I wasn't specific enough about what I wanted from the coaching. I let [the coach] lead that too much. When we finished the coaching, I don't think I'd taken him far enough into the business in terms of my expectations. [His] coaching was very much about me, rather than getting to the bottom of issues in the business. Maybe that's an unfair expectation because he was coming in and out of the business, but it was more about how I was dealing with these, rather than directing me how to deal with things or help me how to deal with them. (Clive)

As this example shows, the coaching sessions were quite often about looking at personal issues, which might then have an impact on the organisation. However, when required, the coaches also looked at the organisation itself, such as defining the roles and responsibilities of some key staff. This provides a very clear demonstration of the difference between coaching as a questioning and facilitating activity, which is consistent with an action-learning ethos, and coaching as a didactic, expert-led activity, where the coach serves as a specialist providing direct instruction (Simpson and Bourner 2007). While action learning has the potential to encompass both personal and business issues in a SME setting (Clarke et al. 2006) this serves as a reminder that not all participants may be fully comfortable with the requirements of the action learning approach.

Participants used the learning log, both during and after the programme, to take notes, record action points and flag-up reminders during the modules. In other words, they used the learning log to distil and record their reflective outcomes from the residential sessions. These were then employed extensively in the coaching sessions, which were deliberately oriented to identifying practical solutions to the issues and problems identified:

> I used it mostly with the mentoring with [the coach]. We referred to things that I had written, action points 4 or 5. It was a very powerful lever for me to go and do these things. The next sessions, if they weren't done, why not? (Alan)

Within the structure of the programme the company visits were designed from the outset to provide a framework for the operation of a classically structured action learning set. The participants were less enthusiastic about this element than they were about the coaching and residential

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sessions, which might reflect their lack of familiarity (and hence discomfort) with the requirements of effective participation in an action learning set process. As such, this confirms that 'action learning is a simple idea, but only at the philosophical level' (Pedler 1997, 258). There was a feeling among the participants that they learned more about the individuals than the businesses themselves:

> I did . . . more about the way other people talk about their businesses. I learnt more about people than I actually learnt about businesses. (Frank)

One of the reasons why they felt they did not learn as much about the businesses as they did about the individuals was perhaps that their businesses were quite different from each other:

> I don't think I learned a huge amount – my business was hugely different from the others. (Clive)

This suggests that for at least some participants the decision to run the action learning sets alongside company visits led to confusion and focused their expectations on the business rather than the leading of the business. Others, however, recognized the fact that even though their companies were different they also shared similar problems and issues. As a result, they considered that the company visits provided an opportunity to share tips and experiences, which also contributed to bonding and establishing trust within the group:

> I think it helped greatly with the bonding of the group and the ability of the group to exchange sharing ideas . . . I don't think the group would have been able to talk so openly to each other or would have been able to talk to each other from a position of understanding or knowledge if we hadn't seen what was going on in each other's business. (Alan)

The action learning sets were facilitated by the programme leader. However, his role and contribution ranged more widely than just this one activity. Not only did participants see him as the overall programme coordinator, but they also strongly believed that he helped them learn and called him 'a stimulator of debate'. They enjoyed the fact that, because he knew their businesses very well, he was able to relate the content of the modules to their own personal needs and problems, thereby facilitating their learning:

> He knows our businesses better than the tutors. That's a very valuable role in terms of increase what we get out of the taught element. He can prompt discussions around our businesses. We would not have the confidence all the time to start such a conversation. He provides a conduit between each cohort. He knows somebody in other cohorts who would have the same problem as you and would direct you towards them. He keeps it going. It would not be the same without him. (Clive)

Building on this comment about the role of the programme leader in ensuring that participants maximised what they got out of the residential workshops (which accounts for the large number of connections between the modules/residential and identified outcomes), it is clear that there were a number of identifiable outcomes in terms of both personal and business changes that could be attributed to the programme.

Outcomes: personal

On a personal basis, several respondents mentioned that the programme gave them more confidence to keep doing what they were doing before participating on it (being reassured seemed important to them). This increased self-confidence was primarily an outcome of the company visits and of the ongoing interaction between participants during the programme. Indeed, for some participants this increased self-confidence was accompanied by a realisation that they were already doing things right: reaffirmation of existing good practice has been as much an outcome of participation as the identification of new best practices to be implemented:

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> There were bits of everything that were very useful. For me, I got a lot of confidence out of it. We were doing a lot of things right, but we didn't know we were doing them right. It gave me a lot of confidence to push on. (Frank)
>
> In terms of the element that I've tried to make the most use of, is the confidence to let other people do things. The confidence to think it's better to let somebody do it their way and it gets done, rather than for it not to be done. It's hard to let go and it's something you have to learn. (Clive)

This increase in confidence has also encouraged participants to experiment and to try to do something that they had not done before. One example of this is delegation. Drawing on both the residential and the coaching sessions most of the respondents said that they managed to delegate work more easily, which, in turn, allowed them to have more free time and spend more time with their family:

> Less hours . . . I'm delegating more . . . I'm very happy to let people rise up to the challenge. I'm sure the course has had a large influence on this. (David)
>
> I have achieved more time with the family. (Clive)
>
> These guys are doing all the day-to-day fire-fighting issues. I have daily update meetings with them. I have more time for other things. (Edwin)

Other personal changes noticed by respondents, and sometimes by their staff, include identifying their own weaknesses (where peer-to-peer communication has been particularly significant) and becoming more open and more aware towards others:

> I would imagine that they [the staff] would be a lot happier with me probably because I am more aware of them. But then again, that comes from having more time to be aware . . . (Clive)

Outcomes: organisational

At an organisational level two main changes were highlighted: improved communication between management and employees and establishing training programmes for staff. In some cases, interestingly, participants were unable to immediately identify outcomes from the programme:

> I knew you were gonna ask that and I can't remember [long pause]. Management development programme for my senior staff. It's in its infancy. We've had six conferences, where I bring the team to an external venue. We start right back, what is the business about, why we are here, bringing in technical advice, how to delegate, etc. . . . a bit like the . . . programme. We've had technical presentations on personnel issues. Training the SMT, we didn't do that. We've introduced an appraisal system. We're in the second year of it in one home and we're gradually rolling it out in the others. It's something that I would not have done and would not have recognised the importance of before the course. (Clive)
>
> I am more involved in training and developing people. (David)

Overall, participants reported that staff morale had improved and there was a clear increase in shop-floor efficiency as well as an uplift in their sales and a visible decrease in their customer complaints, although only one participant drew out these business performance outcomes:

> We did carry out staff surveys looking at communication. We carried out monthly briefing groups and staff meetings (four or five briefing groups, 30 minutes each) we got better two-way communication. It was more informal communication back from the staff, which you would not get in a formal staff meeting. . . . You have to be able to listen and you have to be able to interpret their words. One of the other directors would get strong feedback from the guys, whereas with me, they fear more, they don't say much. (Alan)
>
> Yeah, we've seen a big impact on the morale, they have enjoyed as a group being the guinea-pigs for the appraisal system. (Clive)
>
> Sales went up by 20%, increased shop floor efficiency went up by 4.5%, etc. . . . but the main way for me to judge is what comes through the door. . . . we're developing the exports too. (Edwin)

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Discussion

In this paper we have taken a qualitative, case study-based approach to the evaluation of a leadership development programme for SME owner-managers and leaders (Jacobs 2008; Rigg and Trehan 2004). We have argued that the overall design of this programme was based on an action learning ethos in which coaching, learning logs and company-visit-based action learning sets are the means by which the issues and topics covered in the residential learning workshops were turned into practice. Revans (1980, 312) has argued 'the importance of putting one's ideas and suggestions to continuous test, that is, the very essence of every action learning programme. . . . Action learning is about real people tackling real problems in real time'. In doing this, the development of this extended learning arena (Boud and Garrick 1999; Limerick and Moore 1991) takes place across three dimensions. First, it integrates the five core elements of the programme structure. Second, it bridges the programme and the participants' organisations. Third, it connects across different cohorts of participants on this leadership development programme.

In all three of the dimensions the role of the programme leader as facilitator is central and goes beyond just the role of facilitator of the action learning sets. Indeed, the programme leader here is the mechanism by which the extended learning arena is managed and through which effective leadership development is supported. His role is to design a learning process that facilitates active learning through the development of experiences, including action learning sets and processes, that enable participants to learn by connecting new information to past knowledge in meaningful and relevant ways (Harrison and Leitch 2005; Zuber-Skerritt 1995).

If an action learning approach is to support leadership development, a prerequisite for effective learning is the establishment of trust throughout the programme. In this case-study, this is developed, in part, through social interaction in a non-work-based residential setting and, in part, it is brokered by the programme leader who sets the tone and establishes the groundwork for the group to function. This, in turn, directs attention to the importance of understanding action learning as an ongoing process (Mumford 2006). One of the observable benefits of the development of trust, as a basis for peer-to-peer action learning within this cohort over the seven-month period, is that it begins to break down the 'defensive routines' (Argyris 1987) that inhibit learning. These routines are the conscious and unconscious, stated and unstated ways in which the effective examination of underlying themes, problems, issues and beliefs are prevented. While beneficial, for this process to sustain effective leadership development there is a need to formally provide for continued interaction beyond the life of the programme. It is clear from this case study that while there has been a limited amount of ongoing communication and interaction beyond the programme there has been no systematic continuation of formal mechanisms such as the action learning sets.

It has become clear from this evaluation that in the SME context, where the founder/owner/leader still has a substantial ownership stake in and identification with the business, both learning and leadership development are focused more on personal development than on business development (Pedler, Burgoyne, and Brook 2005). In other words, there has been a shift in focus to examine problems relating to 'own-job' issues in small sets away from the wider organisational setting. One of the challenges for the future development of action learning-based, leadership development programmes will be to re-integrate the personal and the business and to capture the benefits of peer-learning with the discipline of being grounded in a specific organisational setting, which is the locus for the implementation of programme learning.

Iles and Preece (2006) have drawn a distinction between leader development as the enhancement of human capital and leadership development as the creation of social capital. Based on the results of the research reported above, we argue that this distinction needs to be transcended in the development of a framework for conceptualising entrepreneurial leadership development as the basis for further research (Figure 3).

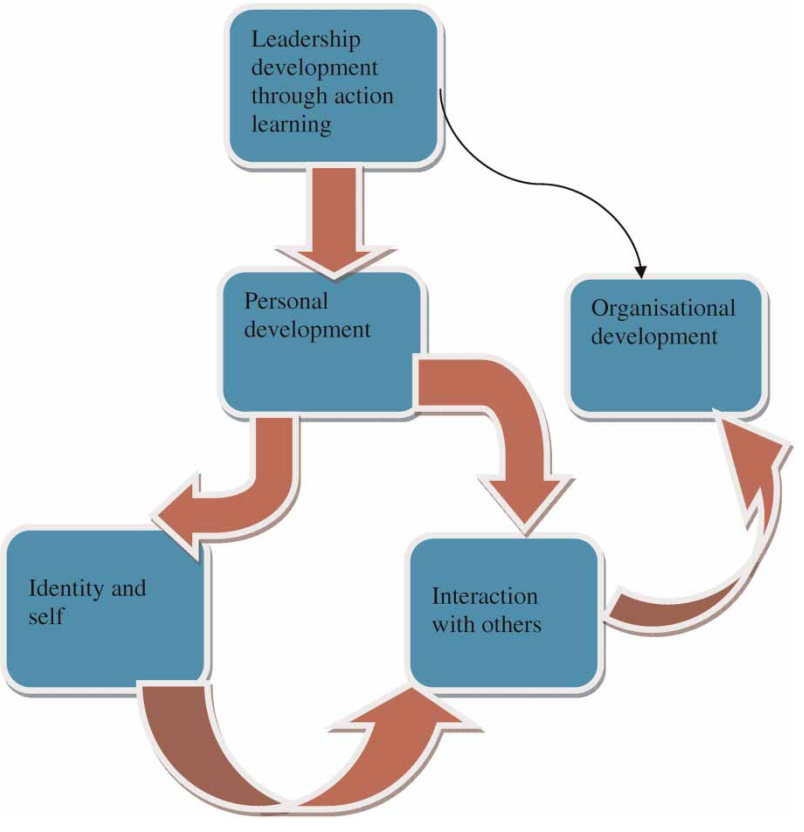

Figure 3. Identity and interaction in leadership development.

As we have already indicated, and as a number of the participants in this research have stated, a key driver for leadership development is the improvement of organisation performance in some respect. While there is some evidence that an action learning-based leadership development programme can directly influence organisational outcomes, it is clear from Figure 2 that most of the reported outcomes are personal in nature (see also Clarke et al. 2006). Accordingly, we see entrepreneurial leadership development as the development of two concepts. First, reported outcomes such as increased confidence, delegation and 'learning to let go' point to leadership development as the process of developing identity, defined as a person's sense of self (Ackerloff and Kranton 2000; Falck, Heblich, and Ludemann 2009; Mitchell and Shepherd in press). Second, reported outcomes such as trust, networking and social affirmation point to leadership development as the process of developing a capacity for social interaction and social capital, the resources the leader generates from the act of co-engaging with others (Nahapiet and Ghoshal 1998). From this perspective effective leadership development necessarily requires the development of leader identity, their sense of self and social interaction, their sense of others. Only in this way, we believe, will it ultimately be possible to see substantive and sustainable organisational benefits.

Conclusion

Based on our research we are able to draw three conclusions. First, action learning as an ethos provides an effective approach to the design and delivery of leadership development

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programmes, which contributes to identifiable personal and organisational benefits. Second, it does this primarily by creating positive outcomes for the individual. These outcomes can be represented as the development of identity and interaction and it is on the basis of these that organisational benefits are attained in the entrepreneurial/small business context. Third, future research into entrepreneurial leadership, its development and impact, will require an integration of theories of identity and social interaction if it is to make a contribution to both the entrepreneurship and leadership literatures.

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