

Productivity in Professional Services (PiPS) Proof of Concept

**Evaluating the potential impact of online career
development support on productivity in SMEs**

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About the Institute for Employment Studies (IES)

IES is an independent, apolitical, international centre of research and consultancy in public employment policy and HR management. It works closely with employers in all sectors, government departments, agencies, professional bodies and associations. IES is a focus of knowledge and practical experience in employment and training policy, the operation of labour markets, and HR planning and development. IES is a not-for-profit organisation.

About The Career Innovation Company

The Career Innovation Company is a research, consulting and technology business with a 21-year track record of supporting larger employers to develop inspiring workplaces that engage employees, drive performance and build agility, via a focus on career development strategy and support. In recent years they have also worked in partnership with Professional Bodies to support their members with their professional development.

The Company has long been interested in finding ways of scaling support to reach larger numbers of employees and managers and was a pioneer in developing a software solution to provide self-directed career coaching back in 1999. In 2016 they developed and tested an e-learning 10-week online 'coaching' course that quickly gained impressive responses with larger employers and professional bodies. It enables workers to 'step up' at work, increase their contribution, and future-proof their skills.

The programme draws on the Inspiring Performance programme that The Company carried out - with leading global employers - in the early 2000s. This research-led programme established the importance of 1-1 conversations between workers and their managers, referred to as 'Engaging Conversations'. www.theCgap.com

The e-learning course equips workers for such conversations and is called 'Be Bold' in your Career'.

About the Business Basics Programme

The Business Basics Programme is designed to test innovative ways of encouraging small and medium sized enterprises to adopt existing technologies and management practices to improve their productivity. It supports projects selected following open competitions, and is delivered in partnership with Innovate UK and the Innovation Growth Lab at Nesta.

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Executive Summary

Increasing productivity, in simple terms the total output produced per input within an economy, has been identified as a key priority by the UK Government, central to its Industrial Strategy, and the key way in which both economic growth and living standards can be sustainably raised. The UK has a productivity gap compared with competitor nations, and there is a long-running discussion as to why UK productivity has essentially flatlined since the 2008-09 financial crisis. Recent Government reports have identified SMEs as a particular focus for understanding this gap.

The purpose of the Productivity in Professional Services (PiPS) project was to explore the potential possibilities and benefits of introducing an online career development programme within SMEs in the professional services sector. In particular, the project was interested to explore whether such an intervention might helpfully support productivity growth within those organisations. Given the short timeframes for the project, it was not expected that measurable change in productivity would be achieved, more that glimmers of changes in ways of working that could result in changes in productivity might be seen.

There were three key objectives:

1. Test whether the 'Be Bold' programme demonstrated positive impact on intermediate indicators of productivity in SME professional service firms (positive changes have been demonstrated by The Career Innovation Company for larger firms, and there is an interest in whether similar results can be obtained in the SME context).
2. Assess whether complementary support for managers, in the shape of the 'Unlocking Potential' programme, was necessary for, or enhanced the impact of, the 'Be Bold' programme.
3. Identify whether, and how, there is value in a more robust large-scale trial of the PiPS project conducted over a longer period of time, and with the capability of demonstrating impacts on quantifiable productivity measures.

The PiPS programme incorporated:

- The 'Be Bold' course for employees of SMEs; and
- A manager stream called 'Unlocking Potential'

The programme has been designed by the Career Innovation Company (Ci). Ci had previously successfully developed impactful online career development programmes for larger employers, and through this project were keen to test whether similar results could be achieved with SMEs. The 'Unlocking Potential' element of the programme was an additional element to 'Be Bold' and was designed to assess whether additional support for managers was important for 'Be Bold' to have the best impact.

The project ran from October 2018 until the end of April 2019, with the programme running between January and March 2019. Eleven organisations (SMEs) took part, with a total of 153 employees registering for the employee stream and 44 for the manager stream (total: 197). Of the employees, 93 started and 45 completed the programme (i.e. 61% of those who started finished the course). This is comparable with completion rates from previous cohorts in other organisations.

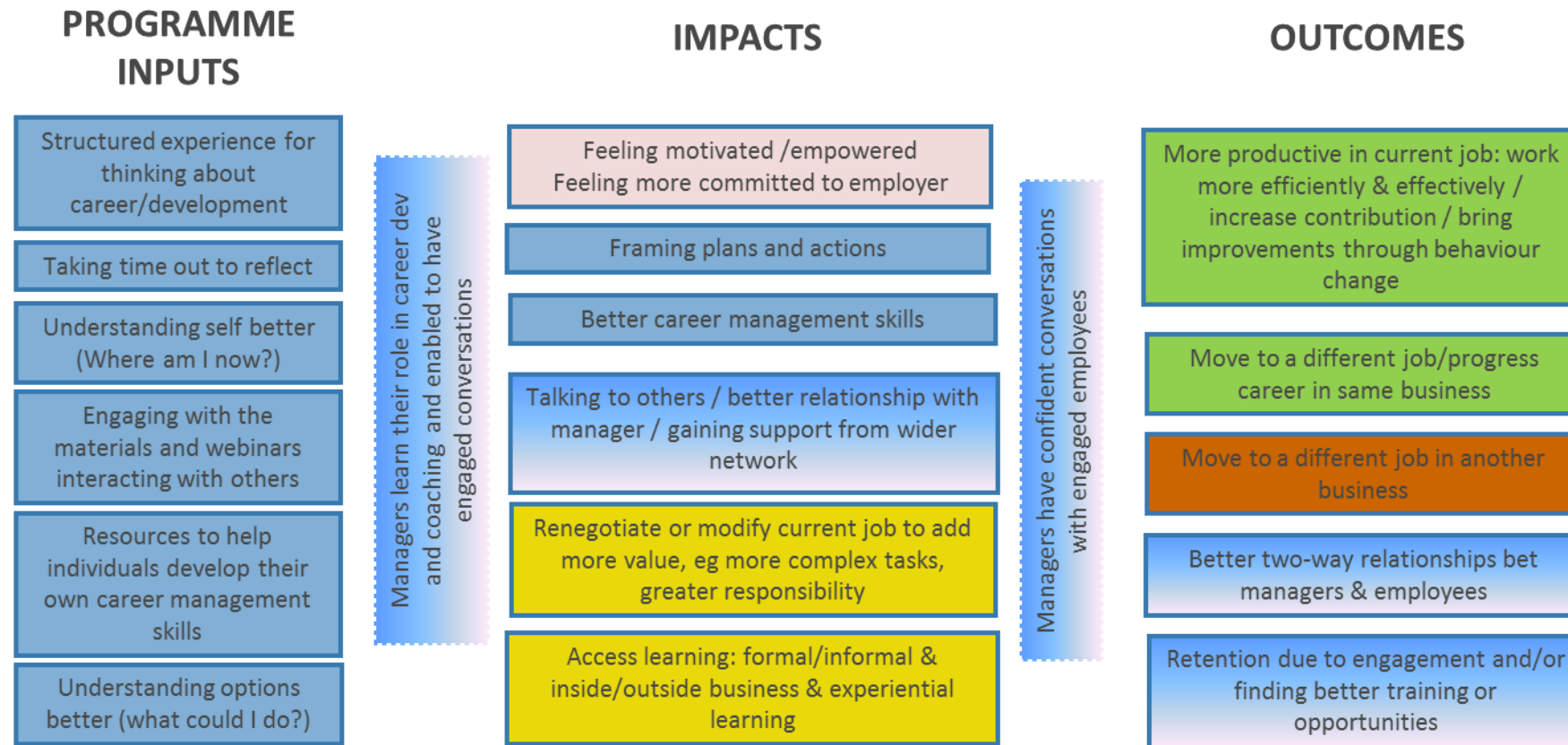
An evaluation approach was devised incorporating feedback from PiPs participants (both 'Be Bold' and 'Unlocking Potential'), senior stakeholders within participating organisations, and wider stakeholders, for example local chambers of commerce, Local Enterprise Partnerships (LEPs) etc. The evaluation comprised:

- In-depth interviews with participants and stakeholders;
- An online survey of participants;
- Online polls; and
- A theory of change workshop.

Valuable input was received through this process, including views from SMEs on what they mean by productivity, and what they believe can be done to improve. (Further detail on this is found in Appendix 5).

The theory of change (overleaf) hypothesised links between the intervention and intermediate indicators of productivity.

Figure 1: Initial Theory of Change for impact of career development intervention on productivity



Pink - emotional response - positive feelings from the programme, including interactions with other participants - M in AMO model. May influence taking action on skill/career development (A and O) but also direct impact on productivity in current role. May also impact retention

Blue - normal explicit aspects of career planning - intended consequences of course materials and webinars - links to actions on skills (A) and career (A and O). Also links to culture and retention outcomes

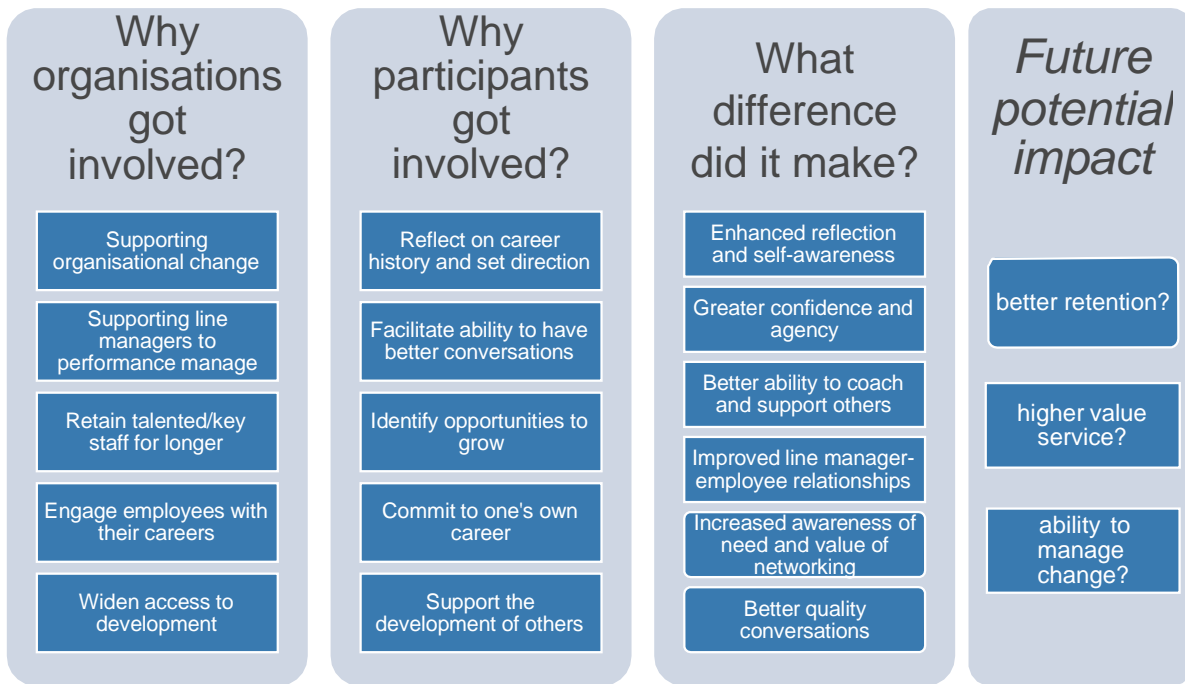
Gold - most obvious intermediate actions - linked with A and M in model

Green - possible direct impacts on individual and firm productivity as a result of A M and O

Brown - taking career elsewhere. A loss to that business, but may increase productivity of sector/area/country by being more productive elsewhere

Whilst participation in the evaluation was relatively low, indications from the data collected through the evaluation largely supported the theory of change, identifying a range of benefits for individuals and organisations. These are shown in Figure 2 below.

Figure 2: Benefits for individuals and organisations



Source: IES

So, what have we learnt with regards to the three key objectives outlined above:

Does the ‘Be Bold’ programme demonstrate positive impacts on intermediate indicators of productivity?

Whilst the numbers involved in the evaluation were small (for reasons explained on page 43), and therefore the conclusions may be regarded as more qualitative than quantitative, the evidence suggests that there are benefits to participants’ involvement in the programme that are in line with the hypothesised theory of change. Participants’ described greater confidence and agency with respect to their career and work. Confidence and agency could manifest in a number of ways, from being more willing to put forward one’s ideas and request professional development, as well as take on more responsibilities and complex tasks. Participants also described finding ways to do their job more effectively. Doing things better or doing different, more complex work could well lead to increases in productivity. Equally, a greater willingness to seek and undertake development, as well as contribute ideas, should both ultimately impact individual and organisational performance. It was also clear from the evidence that participants felt enabled to initiate and have more productive conversations with both their managers and others, conversations which, it seemed, opened up new opportunities and ways of thinking about one’s work or future growth opportunities.

Agency
 'eidʒ(ə)nsi/
‘the capacity of individuals to act... and make their own free choices’

Assess whether complementary support for managers, in the shape of ‘Unlocking Potential’, enhanced the impact of ‘Be Bold’

It does seem from the evidence that there was benefit for managers of engagement in ‘Unlocking Potential’, with it giving managers the confidence to initiate more, and more enabling, conversations with those they manage and others. It seems that in the small number of cases covered by the evaluation, the manager-employee relationship improved as a result. In a sense, whilst not explicitly emerging in the data, there seemed to be both a greater sense of ‘permission’ being given alongside more enabling conversations in which possibilities are explored. That said, the small numbers involved in the evaluation, and the fact that we could not rigorously test and compare two different conditions (‘Be Bold’ without ‘Unlocking Potential’ and with ‘Unlocking Potential’), mean that our conclusions here are less robust than might be achieved from a larger trial with these two different conditions tested.

Would there be value in a more robust large-scale trial of the PiPS project conducted over a longer period of time and with the capability of demonstrating impacts on quantifiable productivity measures?

Whilst the programme has demonstrated benefits for both staff and managers, and it seems that there is value in the intervention in terms of its links to intermediate indicators of productivity, there have been challenges in securing the participation of SMEs both in the programme and the evaluation. These raise questions about how any future programme, and its evaluation, could address such challenges. Conclusions included:

- The valuable role of intermediaries, requiring more time and effort to build the collaboration with those intermediaries whose relationship with SMEs is key.
- Allowing more time and effort to engage and then support the SMEs through the process: clarifying their purpose for taking part, gaining senior buy-in and then helping them engage participants. This took more hand-holding than with large organisations.

One option would be to develop a small-scale trial to test marketing methods and messages, focussed on intermediaries as part of the programme structure, and on a geographical or local community (e.g. coordinated by an LEP) to maximise local marketing. So, in a sense, a trial in which SME engagement methods are the main focus. A further, follow-on option would be to then test the intervention with a larger group over a longer timeframe to see whether the intermediate impacts identified in the study do, in fact, translate to much longer-term changes in outcomes, including productivity. At this point, depending on the nature of productivity benefits in each participating organisation, it might also be possible to make estimates of costs in relation to the perceived benefits to SME productivity and other outcomes.

1 Background and purpose of the project

Increasing productivity, in simple terms the total output produced per input within an economy, has been identified as a key priority by the UK Government, central to its Industrial Strategy, and the key way in which both economic growth and living standards can be sustainably raised. The UK has a productivity gap compared with competitor nations, and there is a long-running discussion as to why UK productivity has essentially flatlined since the 2008-09 financial crisis. Recent Government reports have identified SMEs as a particular focus for understanding this gap, with surveys illustrating that 15 per cent of SMEs do not know what productivity is, and 29 per cent do not know how to measure it. Recent evidence to the House of Commons Business, Energy, and Industrial Strategy Committee, highlighted that a lack of understanding amongst SMEs meant that many were unable to identify what they might need to make them more productive and that they misjudged their own performance relative to comparable firms.

Whilst the debate on productivity has focussed to some extent on the manufacturing sector, there is also evidence that the service sector, and of particular relevance to this study professional service firms, also face challenges. According to the Financial Times, 'lawyers, accountants, and management consultants lie at the heart of the UK's productivity problem, explaining almost a quarter of the shortfall since 2008'.

The Productivity Leadership Group, established in 2015, explored how the UK could address its productivity challenge and concluded that business management and capability were more important than research and development, and technology, in driving improvements. The subsequent Be-the-Business initiative, led by Charlie Mayfield, has sought to understand what support and changes can be made to enhance productivity through management capability. Andy Haldane, Chief Economist, Bank of England has also highlighted the importance of leadership and management skills to UK productivity:

'Looked at quantitatively, there is a statistical link between the quality of firms' management practices and processes and productivity. And the effect is large. A one standard deviation improvement in the quality of management raises productivity by, on average, 10%. This suggests potentially high returns to policies which improve the quality of management'.

Management practices in this context include the capability of managers to do a range of things including develop and support their staff, as well as more widely the ability of the firm to support the training and development of its staff. Multiple challenges and barriers to SMEs identifying, accessing and providing training to their staff, whether that be the development of management skills or more widely the development of staff in general, have been well documented. They include a lack of awareness that they have issues that need addressing, difficulties in identifying relevant training and eligibility for any funding, lack of time to attend training and the costs associated with it.

Within this context, the Productivity in Professional Services Firms (PiPS) proof of concept sought to test a new online programme for employees ('Be Bold') in SMEs. The programme is designed to provide the benefits of coaching at lower cost and larger scale, and enable people to 'step forward' at work, increase their contribution, and future-proof their skills in the face of a changing workplace. Through the programme, employees are enabled to have more purposeful conversations with their managers and to feel both more empowered and engaged. There is a logical connection between the provision of development, engagement and productivity with 'Engage for Success' highlighting that organisations in the top quartile for employee engagement deliver 18% higher productivity.

Separately, IES' own research has identified the importance of the line manager in engagement, and ultimately performance and productivity. Alongside the provision of support for employees, the PiPS project has involved the development of an online programme for managers ('Unlocking Potential') to support their capability in having effective career and development conversations with those they manage. In SMEs investment in leadership, management and soft skills development is potentially limited so middle and senior management may not be well prepared for the conversations their employees bring to them. This is a missed opportunity for the business, and potentially demotivating for the individuals who feel empowered and confident through the 'Be Bold' programme.

The purpose of the PiPS project was to:

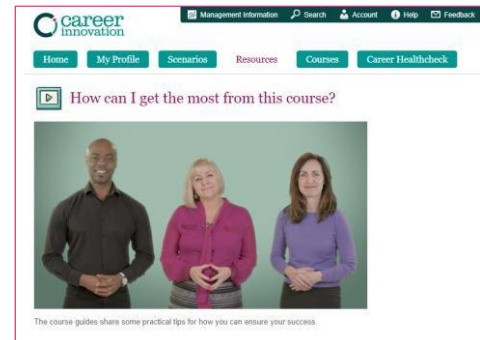
- Test whether the 'Be Bold' programme demonstrated positive impact on intermediate indicators of productivity in SME professional service firms (positive changes have been demonstrated by The Career Innovation Company for larger firms, and there is an interest in whether similar results can be obtained in the SME context);
- Assess whether complementary support for managers, in the shape of the 'Unlocking Potential' programme, was necessary for, or enhanced the impact of, the 'Be Bold' programme;
- Identify whether, and how, there is value in a more robust large-scale trial of the PiPS project conducted over a longer period of time and with the capability of demonstrating impacts on quantifiable productivity measures.

The PiPS project was a proof of concept conducted over a relatively short period of time (October 2018-April 2019). Given the time it would take for measurable productivity changes to emerge, it was anticipated that the project might serve to provide indications as to the *potential* impact of the programme on productivity, the mechanisms by which this impact may operate and the potential value and attractiveness of 'Be Bold' and 'Unlocking Potential' to SMEs in the professional services sector. This project could also possibly identify issues in working with SMEs more widely through such programmes.

2 What is the PiPs programme?

2.1 'Be Bold' in your Career course

The design of the 'Be Bold in your Career' course is informed by known best practices about e-learning, and up to date theory and thinking on career development. It has a 'constructivist' approach at its core: that is the idea that individuals construct their own careers. It also draws on other career theories such as 'career narrative', 'planned happenstance', and Ibarra's '7 unconventional strategies'. It is anchored in the Career Innovation Company's 7 career health dimensions: a set of essential career management skills.



The course includes a diagnostic tool - The CareerPulse™ - which helps individuals assess how well they are putting into practice these career management skills (*stretch yourself, know yourself, adapt to change, spot the opportunities, build your brand, build your network, reflect and plan*).

This flexible course ran over a ten-week period between January and March 2019 and was open to professional and support staff in the SME firms that took part.

Participants completed activities at their own pace and at a time that suited them and their firm.

The course is hosted on The Career Innovation Company's career portal and runs as a standard programme. The PiPS cohort had their own course discussion forum but connected with participants from a range of other employers and professional bodies during the live webinars.

The diagram below gives an overview of the course structure.

Figure 3: 'Be Bold' Course Structure

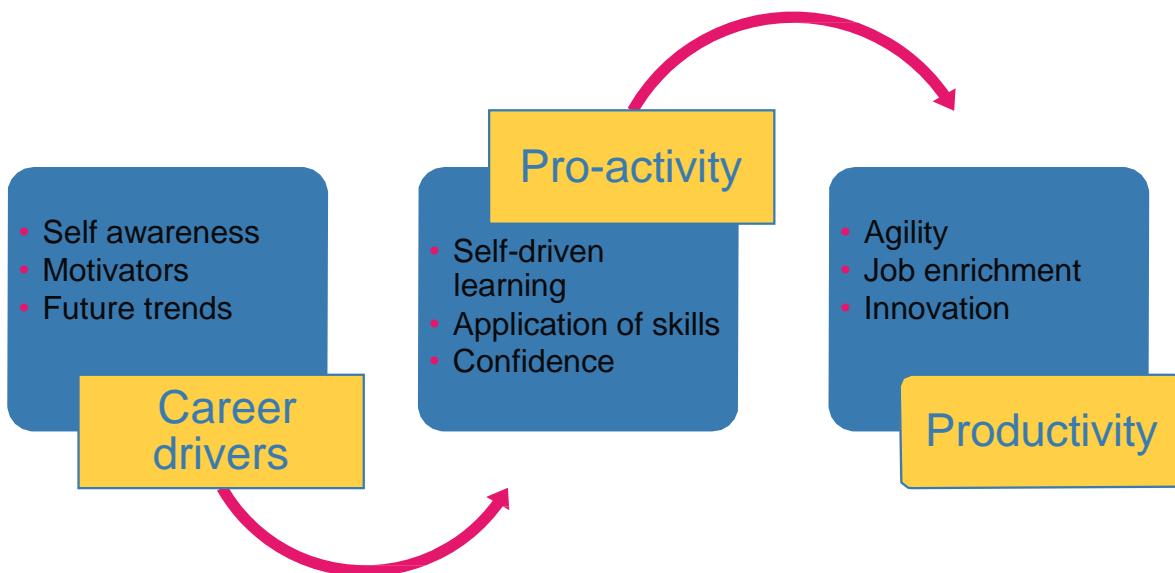


Source: Career Innovation

Other features of the programme include:

- Led by experienced course guides
- Time commitment: c.2 hrs/week
- 4 live webinars (recorded, so they can be watched later)
- Course forum to encourage peer support and interaction
- Bite sized content - interactive tools, videos, articles; available 24/7

The 'Be Bold' course creates a similar experience to an intensive career coaching programme. However, by careful design and use of technology it is delivered at low cost and at scale. The success of the programme lies in the combination of highly engaging 'coaching' modules with encouragement to have high-impact conversations with managers and others, in between each module. It encourages employees towards self-directed learning, and a shift in 'mind set' about the need to apply and grow their skills, moving employees from a passive approach to a proactive one.



'Be Bold' equips employees to be more prepared for workplace changes arising from new technology (including automation), and the need for ongoing professional development and re-skilling. It also helps people to engage with their work and boosts their motivation and confidence.

This goes beyond professional accreditation and compliance. The 'Be Bold' course recognises that most development comes from on-the-job experience, stretch assignments and through learning from others.

2.2 'Unlocking Potential' management stream

In the 'Be Bold' course there is a strong emphasis on the importance of building a network of relationships, and career supporters, and the course equips participants to seek out meaningful professional development conversations with peers, mentors, and managers.

Conversations are at the heart of regular performance reviews, target-setting, and engaging employees in identifying improvement opportunities – all processes that impact on business and productivity. In this 'Proof of Concept' light touch support was also made available to managers, helping them to recognise their role in supporting their team and how to have inspiring conversations. Managers were encouraged to support their employees as they worked through the 'Be Bold' course. Managers were also given the opportunity to take part in the 'Be Bold' course itself, if they wished.

The objectives of this element were to help managers: -

- Be prepared and confident, when a team member asked them for a conversation about their professional and career development;
- Clarify the benefits they would gain personally from focusing on having these conversations, and developing their team;
- Think about the external factors that are driving the need for innovation in professional service SMEs;
- Discuss the resulting impact on skills and careers for the future;
- Identify creative options for employees to stretch and grow in their current role, reinforcing the idea that career development is not just upwards;
- Consider firm-wide activities that impact on staff engagement and productivity;
- Gain from the insights and experiences of managers in other professional services SMEs.

'Unlocking Potential' was an online resource providing guidance for managers while their employees follow 'Be Bold in your Career'. This included curated content and tools, a moderated manager-only chat space and 2 live webinars / recordings.

Managers also received 4 tailored email briefings directing them to activities related to the stage of the course their employees were completing.

This was the first time Ci had put this type of offer for managers in place alongside the 'Be Bold' course for employees.

3 Evaluation approach

3.1 Overall approach

The evaluation approach drew on a range of different sources of data and methods, enabling us to gain the perspectives of different actors and stakeholders. Our methods collected data from:

- 'Be Bold' and 'Unlocking Potential' participants
- Senior leaders within participating firms
- Stakeholders important to the project, for example from Local Chambers of Commerce
- Career development and practitioner experts

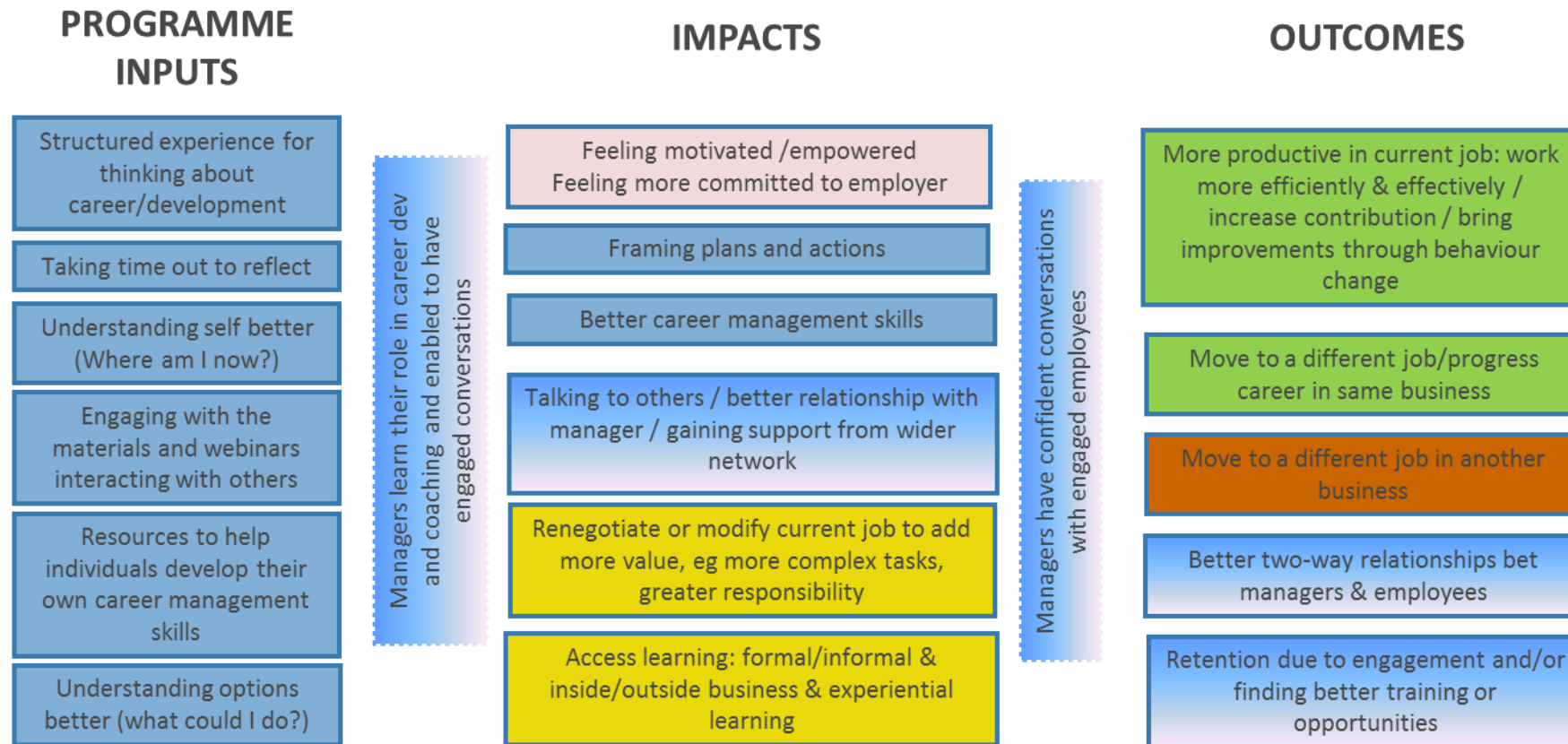
3.2 Theory of Change

The approach to designing the suite of evaluation materials was underpinned by a theory of change developed by the project team. This hypothesised the mechanisms which might link a career development intervention to increasing productivity. This theory of change was based on:

- Extensive knowledge of career development theory
- Substantial experience of delivering career development interventions and programmes
- The literature on how human factors influence organisational performance
- Experience of evaluating other HR interventions in areas such as talent management, leadership development, graduate recruitment etc.

The theory of change is represented in Figure 4 below.

Figure 4: Initial Theory of Change for impact of career development intervention on productivity



Pink - emotional response - positive feelings from the programme, including interactions with other participants - M in AMO model. May influence taking action on skill/career development (A and O) but also direct impact on productivity in current role. May also impact retention

Blue - normal explicit aspects of career planning - intended consequences of course materials and webinars - links to actions on skills (A) and career (A and O). Also links to culture and retention outcomes

Gold - most obvious intermediate actions - linked with A and M in model

Green - possible direct impacts on individual and firm productivity as a result of A M and O

Brown - taking career elsewhere. A loss to that business, but may increase productivity of sector/area/country by being more productive elsewhere

The theory of change describes a set of programme inputs and activities on the left of the diagram, a set of intermediate impacts in the middle column and a set of productivity-related outcomes on the right-hand side. So, the first column describes broadly what people get and do as part of the programme, the middle column describes how they may feel, think and act differently as a result, and the final column how that ultimately impacts on where, how and in what capacity they work (their ability to make the most of their capability and ultimately contribute more in their current, or a different, job).

One of the key purposes of developing the theory of change was to be able to describe how the PiPS programme may impact on intermediate outcomes, which may then be likely to impact measurable productivity change given time. Within the time constraints of the evaluation, it was not anticipated that we would see such measurable changes in quantitative measures of productivity, more indications that the programme had led to changes in attitudes, behaviours and ways of working that would be likely to lead to changes in productivity.

The theory of change is informed by the AMO model formulated by Boxall and Purcell (2003), especially in how impacts and outcomes might effect individual and company level performance – i.e. productivity . The AMO model was originally conceived and intended to explain how Human Resource practices could lead to better individual and organisational performance. In this model, individuals perform well when they have:

- The ability (A) to perform (they can do the job because they have the necessary knowledge, skills and aptitudes);
- The motivation (M) to perform (they will do the job because they want to do it or feel they must do it); and
- The opportunity (O) to perform (their work structure and environment provide the necessary support and avenues for expression of ability and motivation).

The different coloured boxes represent different aspects of the theory of change which map onto the three elements of the AMO model. So, for example, the blue boxes relate to the explicit aspects of career planning such as the completion of career planning resources and webinars, and this set of activities map onto the ‘A’, ‘M’ and ‘O’ of the AMO model. In contrast, the pink box relates to a potential intermediate impact of engaging in the PiPS programme, that of feeling more motivated or engaged with one’s job or career. This element of the theory of change maps onto the ‘M’ of the AMO model.

3.3 Methods and data sources

Our evaluation approach was comprised of the following methods and data sources:

- A theory of change workshop;
- Sign-up forms completed in advance of the programme by participating firms;
- Webinar poll data from PiPS participants. 129 ‘Be Bold’ participants responded to webinar poll data, and 41 ‘Unlocking Potential’ participants;

-
- 12 in-depth interviews with PiPs participants, 7 with 'Be Bold' and 5 with 'Unlocking Potential' participants;
 - One in-depth interview with a senior stakeholder within one of the firms taking part in the programme;
 - An online survey of PiPs participants. 18 'Be Bold' participants completed a survey, and 8 'Unlocking Potential' participants did so; and
 - A series of interviews and a virtual focus group with stakeholders in the project such as Local Enterprise Partnerships, Chambers of Commerce, Professional Bodies, other sector bodies and agencies, and business schools.

Overall participation in the evaluation was low despite considerable efforts on the part of the project to recruit participants to the study. It appeared that both initial recruitment and subsequent participation were difficult, quite often due to lack of time on the part of the individuals concerned. Only 18 'Be Bold' participants completed the online survey. 8 'Unlocking Potential' participants completed a survey about their involvement. Only 12 participants from either course took part in in-depth interviews. Despite the relatively limited participation, we were able to collect a variety of perspectives and this variety enabled us to assess whether we have seen change that may ultimately lead to improvements in productivity based on the theory of change.

More detail is provided below on each of the methods, save for the theory of change workshop which will be discussed in the next chapter.

3.3.1 Programme participants

Webinar polls

Six webinars were held throughout the PiPS programme (between 21 January and 27 February 2019): four for participants of the 'Be Bold' course and two for participants of the 'Unlocking Potential' stream of the PiPS programme. At the end of each webinar participants were asked a series of poll questions.

In addition to asking for their feedback on the webinar content, 'Be Bold' participants were asked about a range of issues linked to their progress in the programme including:

- Thoughts and feelings about starting the programme;
- What activities and support have been helpful in the past in accomplishing career goals;
- Self-perceptions around careers status, and motivations for getting involved with the programme;
- Career habits;
- Progress through the course;
- Thoughts and feelings about progress and self-perceptions around activities that would help in progressing their career; and

- Perceptions around what is important in a career and who may be most helpful in supporting participants' career.

The full set of questions asked can be found in Appendix 4.

'Unlocking Potential' participants were asked about a range of issues including:

- Perceptions of what the key characteristics of effective career conversations are;
- Whether the programme had prompted them to have conversations with their employees about their career, and what, if anything, was preventing them from having such conversations;
- Any changes they had observed in those they manage since their organisation signed up to the PiPS programme.

The full set of questions can be found in Appendix 4.

There were between 9 and 70 responses for each of the webinars. The data was collected at the end of the programme and sent to IES for analysis.

In-depth Interviews

The Career Innovation Company contacted PiPS participants to request interviews, using the organisations' lead contacts to encourage participation. Further requests were included in the final programme survey. 46 participants were contacted but there was a poor response rate, despite frequent chasing by email and via the organisational leads, from Ci. Several people declined to take part but one later provided feedback via email on their views on participating in the PiPS programme.

14 participants agreed to take part and two were later unavailable for interviews. 12 interviews with PiPS participants took place between 14th March and 8th April 2019. Seven of these were employees who had gone through the 'Be Bold' course and five were managers. Three of the managers had participated in both the 'Be Bold' and 'Unlocking Potential' programmes.

There were separate sets of questions for 'Be Bold' and 'Unlocking Potential' participants, with the option of combining questions for anyone who had participated in both programmes. Questions were informed by the theory of change discussed previously.

Interviewees were asked about:

- Why they decided to get involved with the 'Be Bold' programme. What did they hope to achieve?
- What elements and aspects of the programme did they find most/least useful, and why?

- Whether, and in what ways, the Programme changed the way they feel, think, or act in relation to their job or professional development?
- What the main benefits have been, if any, of their participation in the 'Be Bold' programme?
- Whether the programme had changed their perceptions around the ability to progress their career either within their current firm, or outside of it?
- What, if anything, have been the main barriers to their getting the most out of the programme? And how might these barriers be overcome, either by changing the programme or addressing barriers within the firm?
- What the main benefits have been, if any, of their participation for their firm?
- What future actions, if any, do they intend to take to develop their professional life and career?

Managers who had done the 'Unlocking Potential' course were asked:

- Why they had participated in the 'Unlocking Potential' course? What did they hope to achieve?
- What they found most/least useful? And why?
- Whether participation in the course had helped them become more confident and/or feel more able to have development conversations with those they manage?
- Whether participation in the course had changed the way they feel, think or act in terms of supporting the development of the staff they manage?
- What changes, if any, they had observed in either the way the staff they manage, their team or their organisation works as a result of participation in the programme?
- Whether there were any barriers to taking part in the programme or applying the learning from it, and how they might be overcome in future?

The interview discussion guides can be found in Appendix 1.

The interviews were carried out by IES researchers, recorded and written-up. The notes were then analysed, alongside the quantitative data available, to draw out common themes and topics relating to the impact of the PiPS programme.

Online Survey

An invitation to participate in an online survey was sent to all PiPS participants by Career Innovation at the end of the ten-week programme, in late March 2019. There were different surveys for 'Be Bold' and 'Unlocking Potential' participants and the questions, again, were jointly-devised by Career Innovation and IES. The questions were informed by the theory of change described previously.

'Be Bold' participants were asked about a range of issues including:

- Their perceptions of the 'Be Bold' course, what they liked most and least about it;

- Whether they would recommend the 'Be Bold' course to others;
- Whether their manager had played a supporting role in their participation in the course;
- Whether, and how, the course had changed the way they feel, think, and act in relation to their own professional and career development including whether participation:
 - Increased their level of motivation about their current job
 - Made them more empowered to take action about their career and development
 - Inclined them to develop their career with their current employer.

They were also asked which career actions they had taken, including having conversations with their manager, learning new skills, taking on new responsibilities and widening their network.

'Unlocking Potential' participants were asked about a range of issues including:

- Whether they found the course useful;
- Whether participation in the course had made them feel, think or act differently in relation to supporting the staff they manage in their development including whether participation
 - Made participants feel more confident about engaging in conversations with their staff about their development;
 - Enabled participants to be more aware of how they could support the development of their staff;
 - Made participants feel more able to identify and secure opportunities to support the development of their staff;
 - Enabled participants to support staff to take on more complex roles and responsibilities.

Snapshots of the online surveys and questions can be found in Appendix 2.

The online survey was administered by Career Innovation. Participants received several reminders and were encouraged to respond by the participating organisation contact leads. In total, 18 responses were received from 'Be Bold' participants (40% of those completing the programme). 22% (n=4) of these respondents indicated that they had responsibility for managing staff. The remainder did not. Of the four people who manage staff, three did the 'Unlocking Potential' stream of the PiPS programme. 8 responses were received from 'Unlocking Potential' participants (50% of those completing the programmes).

3.3.2 Participating firm stakeholders

On signing up to the programme, a representative from the firm completed a sign-up form, including responding to some open-ended questions:

-
- In your organisation, how do people define 'productivity', and what measures (if any) do you have for monitoring productivity over time?
 - What other aspects of success are particularly important to your organisation (e.g. people invest a lot of time discussing how to achieve this)?
 - What is hampering productivity at the moment? (Or what might help improve it?)
 - Do you have a 'live' strategic topic or initiative that you would like the programme to support, by helping people engage with this personally in their work and career?
 - In what ways would you expect the following to benefit your organisation?
 - Increased staff motivation to develop new knowledge, skills and experience.
 - Opportunity for people to think about emerging trends impacting their work.
 - Discussions between staff and managers about future work plans and opportunities.
 - Which of the following do you have in place to support professional and career development?
 - Someone with specific responsibility for staff learning and development
 - An HR professional who plans and coordinates staff learning and development
 - A forum for discussing staff learning and development
 - Who they plan to offer the PiPS programme to: all professional staff; all support staff; selected staff.

In addition, we spoke with a senior stakeholder from one of the participating firms to understand the key drivers at a firm-level for participation. We did reach out to more of the participating firms but were only able to secure one interview.

3.3.3 Wider stakeholders

Representatives from Career Innovation carried out interviews with wider stakeholders including Local Enterprise Partnerships, Chambers of Commerce, business schools and others. In addition, representatives from Career Innovation facilitated a virtual focus group of stakeholders. Key themes and questions covered included:

- Understanding and views on what productivity means to SMEs?
- What is important for SMEs?
- What are the barriers to businesses fulfilling their potential?
- What can SMEs do for themselves? And how might other stakeholders best support the efforts of SMEs?

The intention within these discussions was to understand stakeholder views on the challenges and opportunities for supporting SMEs to enhance their productivity, and inform understanding of how a future programme such as PiPS might work on a bigger scale than was possible within the time constraints and resources of this proof of concept.

4 Who took part and what did they do?

4.1 Profile of participating organisations

11 organisations took part in the PiPS programme trial from all over the UK. These were made up of nine law firms, one digital services company and one accountancy firm.

The organisations ranged from 30 to 160 employees; the average size was 80.

4.2 Participant numbers and completion rates

Table 1: Final usage data

	No. registered	No. started	No. completed	% completed (from registration)	% completed (from starting)
'Be Bold' course	153	93	45	29%	61%
'Unlocking Potential' course	44	43	16	36%	37%
Both courses	48	16	6	13%	38%
Total	197	136	62	31%	46%

Note: When a participant completed 50% or more of the programme's resources and attended at least three webinars, they were considered to have 'completed' the programme.

Source: Career Innovation

Table 1 shows the number of individuals registering for the 'Be Bold' and/or 'Unlocking Potential' programmes, the number registering who subsequently went on to start one or more of the programmes, and finally the number considered to have undertaken sufficient resources on a programme to be considered to have 'completed' it. It is important perhaps to note that PiPS participants, whether on 'Be Bold' or 'Unlocking Potential', are able to self-navigate through the programme and use different resources flexibly. From an evaluation perspective, this does raise the question of what it means to 'complete' the course. What does that look like? Is it a certain number of activities completed, the completion of a smaller number of critical elements or a different combination of activities and resources. For the purposes of the evaluation and in line with The Career Innovation Company's existing practice, a definition of completion was adopted that meant if an individual had completed 50% of the resources and attended 3 webinars they could be considered to have completed the programme. It could be, of course, that participants who registered but did not 'complete' the programme may still have benefited from it.

From the figures, it is clear that for 'Be Bold', whilst there is a drop-off in those starting the course having registered, the majority of those that registered went on to complete the programme. This suggests interest in the programme but some difficulty in embarking on the programme itself. For the 'Unlocking Potential' programme, the picture is different. Virtually all those who registered started the programme, but once started, the percentage completing the programme was much lower. It's not clear from the above figures why, but since participants were likely to be managers, it could reflect greater time pressures amongst this group.

It was not possible to identify from the usage data which of the 'Be Bold' participants were employees and which were managers. It was likely that most of them were employees only.

4.3 What did they complete?

Table 2: Completion of the webinars by PiPS participants

No. completed	'Be Bold' Webinar 1	Webinar 2	Webinar 3	'Be Bold' Webinar 4	'Unlocking Potential' Webinar 1	'Unlocking Potential' Webinar 2
Participants	71	30	20	4	-	-
	-	-	-	-	32	9

Source: Career Innovation

It is clear from Table 2 that participation in the webinars declined throughout the course of the programmes. As participants are able to pick and choose which webinars they attend, declining participation does not necessarily correlate with the webinars being perceived as not useful. This pattern of participant behaviour is also consistent with the experience of providing the on-line course elsewhere. It could simply reflect individuals navigating their way around the programme's resources and identifying what is most useful for them.

Table 3 below shows the number of resources completed by participants over the course of the programme. Resources include things such as completing a career health check, assessing strengths and interests, reading about the 4th Industrial revolution and impact on work, watching videos lead by the course guides, completing activities involving conversations with others. This shows the number of resources for each module decreasing over the duration of the PiPS programme. It should be noted, however, that as mentioned above, participants are able within the programme to pick and choose what they feel is most valuable to them at that time. Declining participation may reflect individuals navigating through the programme and focussing on the resources most useful to them. It is also the case that not all participants were likely to have indicated that they had completed a resource, so the numbers above could be higher in reality. That said, declining participation may also reflect declining interest or barriers to full participation such as lack of available time or support from within participants' organisation. These issues will be explored in chapter 7.

Table 3: Resources completed by PiPS participants

Modules	Resources completed
Introduction to 'Be Bold in your Career'	335
My story, My network	401
Futureproof your career	358
Moving forward	183
Ideas into Action	143
'Be Bold in Your Career' - Completion	56

Source: Career Innovation

Table 4: Most and least used resources in the PiPS programme

Modules	Number of completes
Most used:	
Introduction – where to start	71
The story of your career – where to start	71
Introduction to 'My story, My network'	70
Jan 19 Course Overview	69
How to find fulfilling work	68
How can I get the most from this course?	67
Least used:	
Conversation – Get support for your development	11
Give us your feedback on "Be Bold"	11
Goal setting	11
'BE BOLD' – Reach out to someone who has influence	10
Manage My Career Plan	9
QUIZ – Work in progress	9

Source: Career Innovation

The resources completed by participants relates to when in the PiPS programme they were released and presented to participants. So, in the earlier modules, such as the Introduction phase, *My story, My network* and *Futureproof your Career*, the number of resources completed was greater than the number for the later modules, *Ideas into Action*, and the Completion phase.

It is likely that the resources which were quick to read but required participants to reflect with someone else (such as '*Re-invent yourself*', '*Critical friend*' and '*Get support*') would have taken them longer to complete and also featured later on in the PiPS programme, so were less likely to have been completed.

5 Stakeholder engagement

Barriers to stakeholder engagement

In the original bid stakeholder engagement was characterised as partnership working and contextualising the project for smaller businesses. The Career Innovation Company's original bid identified the need to work through channel partners to reach SME businesses. Attempts to build conduit relationships during the bid preparation started to highlight inherent difficulties in establishing such relationships, and in achieving commitment from partners.

There is a significant challenge for potential training providers to appropriately segment the SMEs population into coherent cohorts. A solution to the challenge of reaching SMEs is suggested by the FSB which identified that "the initial points of contact for many businesses, especially start-ups, are banks and professional or business associations; these organisations have an established relationship with many small businesses", and so FSB has recommended greater involvement from finance providers and professional associations (Leading the Way: Boosting Leadership and Management in Small Firms, FSB, p11).

Most of these organisations however operate within robust governance mechanisms which exist to safeguard the public interest, ensure financial probity and protect the reputations of the organisations themselves. An unintended consequence of these mechanisms is to inadvertently create significant barriers to collaboration and partnership. This Proof of Concept project wanted the opportunity to fully understand these and pave the way for effective and efficient access partnerships for the full trial.

During the bidding and start-up phases of the Proof of Concept project the Career Innovation Company made contact with a wide range of potential partners of the types advocated by the FSB, and in doing so encountered much interest and goodwill which ultimately were of limited practical utility to the project because of time constraints, competing priorities, and the rigours of due diligence and good governance protocols. For example, this created a 'Catch 22' situation when a major high street bank was unable to commit during the bidding phase because the proposal at that time was not guaranteed funding, and once funding was secured the time constraints of a six-month project were insufficient to fulfil their internal due diligence protocols for 'on-boarding' a new 'supplier' and brokering contact with their SMEs within the project completion window. Negotiations were further hampered by commercial sensitivities and expectations of 'exclusivity'.

In the case of professional bodies, it became clear that formal approval to support such a project usually requires a proposal to be considered by relevant committees with rigid predetermined schedules, and even where these processes can be circumvented a proposed project needs to align with pre-existing organisational priorities without competing or distracting from existing commitments. A number of potential partners were

unable to contribute to the project because of long-standing pre-existing resource and capacity commitments to other projects. For others, especially Chambers of Commerce, LEPs and Business Schools, the Christmas period disrupted attempts to communicate with their SME networks.

It is worth considering the extent to which the desire for rapid return and results from short-term funding initiatives might fundamentally inhibit the potential effectiveness and viability of projects which require collaboration with partners, most of whom would usually commit resources to business priorities and projects long before a government funding call is made public. It also appears that SMEs are particularly constrained by their own sector's business cycles, for example recruitment of accountancy SMEs was significantly inhibited by the project window covering both the late January online tax return deadline and the April end of the tax year.

The FSB advice did prove accurate, however, as the Law Society proved the most effective conduit in recruiting SME professional services businesses to participate in the 'Be Bold' and 'Unlocking Potential' programmes. Critically, The Career Innovation Company had a developing relationship with the Law Society prior to the bid, and the subject of the bid aligned with several of the Law Society's pre-existing organisational priorities around improving productivity and promoting adoption of technology.

In detailed one-to-one interviews with colleagues from the Law Society it became apparent that their success in recruiting SMEs to the project derived from the individual relationships they had with target SMEs, knowing who to call and who would answer the call, rather than from exploiting a scalable system. Thus, the experience of this project bears out the received wisdom about the challenge of reaching SMEs. In this case there was both a pre-existing relationship between the Career Innovation Company as the project delivery partner and the Law Society as the channel partner, and between individuals within the Law Society and their contacts in the target SMEs. Other partners able to recruit SMEs to the project reported similar reliance on personal rather than systemic networks.

Once recruited SMEs brought a number of challenges to the project, not usually encountered by the Career Innovation Company when delivering their programmes in larger corporate businesses, see section 5.

Stakeholder involvement

Notwithstanding the challenges of recruiting channel partners and SMEs to the project several cycles of email, calls and interviews were undertaken with key stakeholders between January and April 2019.

These interventions were designed to illicit intelligence and explore perceptions about the nature and meaning of productivity, the reality of SME business practice, and what enablers and barriers existed to enhancing productivity for smaller businesses. The enquiry was iterative, with issues arising in each cycle of engagement informing the

questions considered in subsequent discussions. The initial project envisaged one-to-one calls leading to a series of focus groups and culminating in a dissemination workshop.

The stakeholder engagement plan was impacted by many of the same issues of timing and competing priorities as the recruitment of conduit partners and SMEs to the project, so to optimise and maximise the learning from as many partners as possible a pragmatic decision was taken to focus on calls as they could be scheduled and a single virtual focus group. Many stakeholders expressed interest in the findings of the project and the potential to take the work forward but few were available for the scheduled dissemination workshop because of Easter so this has been deferred until June.

The Stakeholder group consisted of influencers from organisations working with SMEs, and encompassed LEPs, Chambers of Commerce, Professional bodies, other sector bodies and agencies, and business schools.

Perspectives on ‘Productivity’

The primary focus of the funding initiative was clearly to identify interventions that would contribute to improved productivity in smaller businesses. From the earliest stages of the project many of the conversations explored the nature of productivity.

The established economic measure of productivity is “commonly defined as a ratio of a volume measure of output to a volume measure of input” (OECD), which in professional services SMEs is usually measured in terms of chargeable time. Although none of our stakeholders sought to dismantle established economic ratio-based definitions, it is interesting to note that the topics emerging from the interviews and the focus group coalesced around more nuanced considerations regarding the conditions of productivity and the non-chargeable contributions made by individuals to an organisation.

The methodology for the stakeholder engagement project strand was such that the questions deployed in the focus group had emerged from the preceding one-to-one conversations, thus the question set can be considered the output of that phase of the work.

To encourage expansive thinking about the conditions for productivity, and to avoid assuming everyone understood the same by the word, a deliberate decision was made to avoid over-reliance on the word itself. The questions were presented in an online presentation and polling software used to gather anonymous responses. The 90-minute session was recorded for internal reference by the evaluators on the understanding that anonymity would be preserved. The questions used were:

- When you think of productivity, what comes to mind?
- Think of words other than productivity that capture what is important for small and medium businesses. What is different or specific for professional services?
- What are the barriers to businesses fulfilling their potential? How can these barriers be reduced?
- What can businesses do for themselves and what input is helpful from outside the business?

- Thinking about the different ways individuals contribute to an organisation, how can you recognise and evaluate non-chargeable activity?
- Thinking beyond the job and salary, what does an organisation contribute to the individual who works with/for it?

The report from the polling software used in the virtual focus group gives an indication of the responses to these questions and the issues arising from them - see Appendix 5 . Efficiency, engagement and output rather than input were at the forefront of people's minds when describing productivity. It is interesting to note that 'staff' is at the centre of the word cluster capturing what people in the focus group think is important – beyond productivity - for small and medium professional service firms.



In addition to issues arising from the focus group some pertinent observations emerged from individual stakeholder conversations which should be noted for future consideration of the productivity challenge:

- In some business sectors and in some geographical locations the choice to work in smaller businesses may be a lifestyle or ethical decision not necessarily aligned with established economic concerns of productivity. In such circumstances it would be helpful to consider what alternative business success metrics may apply.
- For some geographical areas good levels of productivity (output: staffing) were seen indicators of growth potential but that this was inhibited by an inability to attract the necessary talent to the area.
- A number of stakeholders spoke about the need to build internal leadership capacity within smaller businesses, and especially to consider strategic approaches to human resourcing.

In professions based on precedent and compliance, arguably law and accountancy in different ways, practitioners are potentially predisposed towards maintaining a status quo and avoiding error. This might manifest as heightened risk-aversion and inhibit innovation in both professional practice and modernisation of business processes.

6 Project initiation and SME Engagement

1. Marketing to recruit SME Firms

We took a deliberate selective and personal approach to finding SME firms, working in partnership with The Law Society; their relationship managers reached out to individual firms they knew which were looking to grow, improve productivity, and develop their employees. This was the most successful method of getting in touch with interested SMEs. The Law Society also shared information via social media on LinkedIn and Twitter.

We also made connections with SMEs through our own network and social media sites.

Although not able to fully commit as a stakeholder due to time constraints, ICAEW contacts were interested in the project, and reached out to a couple of accountancy firms personally resulting in two introductions to SMEs and one sign up.

The FSB shared information about the project in their newsletter, local growth hubs shared details on social media, and Marjon University reached out to individual firms by email. These approaches generated enquiries which resulted in one sign up.

2. Communication with SME key contacts

To educate and engage interested SMEs in the programme we guided the key contacts from each firm, generally SME leaders and Human Resources Directors (HRDs), with email correspondence using the following collateral:

- Overview of the programme – pdf document.
- Benefits for your business – pdf document.
- 10-minute online demo which previewed the programme content, summarised benefits and outcomes, including personal feedback from previous participants.

Alongside the emails most key contacts needed phone conversations to help individuals understand the process and rally them to take part in two online calls:

- A roundtable hosted by Rosemary McLean and Jonathan Winter - this online webinar was recorded and shared with others along with a deck of slides. The discussion explored how productivity in professional service SMEs can be enhanced by supporting employees with their career development.
- A roll out briefing by Jonathan Winter, Valerie Rowles and Becky Rush – in this online webinar, the discussion continued and the team also shared information with SME leaders about:
 - How to use the programme to support firm-wide priorities
 - Who to offer the programme to, and how to communicate the offer to them

- Confirmation of dates and practical 'roll-out' plan
- Review of the collateral available, and other support from us

We shared these recordings with people who could not attend, and also had conversations with some key contacts to help them to think through how to position the programme with their strategy and business need.

3. SME sign up and promotion to participants

The next step involved registering SMEs to take part using the sign-up form where they committed to take part and defined their company's size, details of the cohort, strategic objectives and expected benefits. This involved conversations on the phone, and exchange of emails. Around 50 SMEs were spoken to by telephone, to achieve commitment from 11, and once signed-up, each of those 11 had 4-5 phone calls in addition to the webinars. On sign up each SME received:

- Inspiring Performance information pack - designed to inform key contacts about the programme and for them to adapt to brief their staff.
- 'Be Bold' flyer - for key contacts to promote the programme to participants and guide them through registration.
- 'Unlocking Potential' flyer - for key contacts to share with managers and guide them through registration.

Sign up and promotion to participants ran over the Christmas period, creating additional challenge at this point to the general time constraints.

At this point, we were monitoring manager and participant sign up and proactively communicating with the key contacts to maximise participant numbers. This continued into weeks 1 and 2 of the live programme – we reported on active participation in the course and followed up to maximize participation. In terms of numbers, the eleven SMEs at first said they would invite (in total) 529 participants. Then, after internal discussion (several decided to focus on certain talent groups), the invitation was eventually given to 280 people. This resulted in the 197 managers and staff who registered.

4. Communication during the programme

- Mid-point reports were emailed to key contacts resulting in some conversations and correspondence about participation.
- There were some requests for late sign ups and problems with log ins.
- We were in touch with requests for evaluation and feedback.
- The majority of communication was direct with participants during the programme.

5. End of programme communication

- Participating SMEs were thanked for their participation and given feedback on the programme. This report will also be shared with them.

Two key learning points about the SME engagement process:

The timescale was challenging – a longer lead time into the programme would definitely increase SME sign ups as some firms did not take part because there was not enough time to gain buy in and implement the programme. It would also increase the number of individual participants and reduce pressure on key contacts within firms.

SMEs generally need individual, but varying, levels of support to align the programme with their strategy, in order to commit to participation – this requires dedicated resource and one-to-one support in addition to the group discussion/briefings/collateral approach we planned for. Our experience was that the SME businesses and their employees needed more ‘hand- holding’ than is needed when offering the ‘Be Bold’ programme to larger employers.

It is also worth noting that the firms differed both in the benefits they hoped to achieve, and in the sophistication of their approach to issues of talent and productivity. Where we found a highly-engaged HR professional, this enabled a more strategic engagement with the programme and required less support effort from our team.

7 Motivations, benefits and outcomes

7.1 Motivations for getting involved

Through the sign-up forms, surveys and in-depth interviews with organisational representatives and participants we were able to understand why involvement in the programme was attractive. Some key themes emerged.

From an organisational perspective, motivations included:

- Supporting conversations about, and helping staff adjust to, organisational change in the face of anticipated automation and changing roles
- Helping retain talented and valuable staff for longer periods of time
- Supporting employees to take greater ownership of their career, growing confidence and encouraging greater agency amongst staff to shape their work and career
- Helping support a reshaping of annual review processes to focus more on quality conversations, as opposed to process
- Widening access to development opportunities, in this case beyond professional to support staff

One senior stakeholder from an accountancy firm reported a range of inter-linked motivations for getting involved. Technology and automation were changing the way that the organisation did business, and placing greater emphasis on the organisation being able to offer higher value-added services. This change was likely to impact on how employees see their role and the skills they need, and the PiPS programme was seen as a useful way of supporting conversations around the anticipated change. Equally, the same senior stakeholder saw the programme was potentially beneficial as an aid to retaining talented staff, particularly those employees who are one to two years' post-qualification and are at risk of leaving the firm. The senior stakeholder reported that holding on to these employees for one or two more years would have significant gains (in terms of fees earned) for the business. They also felt that the programme may have a benefit in terms of influencing positively the allocation of work assignments in the firm.

Involvement in the programme from an organisational perspective was also in some cases more broadly about encouraging all employees to take greater ownership of their careers and to review progress more regularly. This perspective, expressed by a Learning and Organisational Development specialist, was echoed by managers participating in 'Unlocking Potential'. One manager who participated on the course reflected to us that there was a need to reframe what 'career' actually means and that it is evolving beyond a traditional approach and the focus should now be on instilling a growth-mindset at work. They also reflected that, from their perspective, it was increasingly important for them to

think about the careers of others particularly with a multi-generation workforce who have varying needs and motivations.

'The view emerging is that tech will replace the mundane offering the chance to focus on the human elements of strategic thinking, relationship building, innovation etc. This can only be a good thing. Isn't this kind of major sea change akin to the industrial revolution or the emergence of robots building cars? In these cases people gained different skills and moved laterally to survive. I'm no expert but can guess that the need for this kind of agility is the norm now.'

Manager on 'Unlocking Potential' Forum, April 2019

In some cases, the programmes were used to support organisational initiatives aimed at reshaping the annual review process, and focussing that much more on the conversation between manager and employee. One Law firm had launched a new initiative called 'Great Conversations' to replace their existing Performance Development Review (PDR) process. PiPS, they felt, would support the new initiative and support candidates (for promotion) to think about and prepare for the next step, as well as driving development for individuals and teams within the business.

The programme was also seen by a key stakeholder in one organisation as helpful in supporting line managers to be better able to manage performance.

'I'm hoping at the end of our PMRs [Performance Management Reviews] that there will be some really valuable conversations happening.'

Learning and OD Specialist, 'Be Bold' participant

The programme was also used in some cases to widen access to development opportunities to groups of staff who may not otherwise receive much in terms of development. In the case of law firms, the programme was partly used to enable support staff as well as Solicitors to access development opportunities.

Reception staff (who are often female returners) sometimes think they don't have potential and this particular director wants to push them to believe they have a role for themselves and to help the business. Annual appraisals were due in her organisation so it gave a great chance to talk about how they want to develop and set more objectives and goals for coming year. It has helped them to think about it more.

Director, law firm, 'Unlocking Potential' participant

The survey of participants identified some key motivations for getting involved in the programme:

- 10 of the 18 'Be Bold' participants said they were looking for career progression or challenge;
- 9 out of the 18 said that they wanted to make a plan for their career or future development;

Insights from the research interviews provided further insight about reasons for getting involved. These included:

- The opportunity to reflect on career progress to date, and to consider potential future opportunities
- Growing confidence and capability in initiating and managing better conversations with staff, managers and indeed potential clients
- Making a commitment to their own career
- Helping to identify opportunities and ways in which they might do their existing job better, or find other opportunities, predominantly within their existing firm.

In terms of why participants became involved in the programme, for some involvement was about the opportunity to reflect on their career to date, what had been the positive and negative experiences to date, and to think about future career direction. For others, participation was about developing better 'soft skills', greater confidence and ability to initiate and manage conversations effectively with staff but also with their own line managers. A key skill mentioned in this regard was the ability to facilitate and enable rather than problem-solve.

'It was useful for me to look back on all the stuff that had happened in my working life and see where the positives were, and how they made me feel. I also looked at where I dipped or had a negative experience, as well as personal things. So it's been good to look back and see when things happen how they affect my work.'

Employee in law firm and participant on 'Be Bold'

On a personal level she wanted to be involved to build her confidence and improve her communication skills, meeting people etc, and give her practical tips. Feedback from her Personal Development Plans (PDPs) had given her a steer as to what her development areas might be (i.e. communication, to meet people, build her expertise). On a business level *"it's important to me to work as effectively and positively as I can"*. She wants to learn from others and develop her personal brand so that it is presented most confidently, to benefit the business.

Manager law and marketing firm and participant on 'Be Bold' and 'Unlocking Potential'

Other participants felt that becoming involved with the PiPS programme was a way of showing commitment to one's own career. This could manifest in several ways for participants. In some cases, individuals spoke about wanting to understand how they could identify opportunities to develop themselves, whilst others spoke about finding ways in which they could improve their day-to-day working and improve within their current job. In one case, an individual got involved with the programme because they felt their career was stagnating and that something needed to change either in their role or in their approach to it.

It is worth bearing in mind that in some of the firms, participants were actively recruited to take part, so it may not have been a totally voluntary choice on their part.

For managers participating in 'Unlocking Potential', there were dual motivations of supporting their own career development whilst also being able to support the development of others.

7.2 What did participants think of the programme resources

On balance, from a limited number of respondents to the survey, the course materials were well received and useful. For example:

- 14 out of 14 'Be Bold' participants who also responded to the relevant question on the survey, said that the course features and resources were at least adequate, with the majority (9 out of the 14) saying that were good or excellent;
- All 4 of the 'Unlocking Potential' participants who responded to the relevant question on the survey said that the course features and resources were good or excellent;
- 8 out of 10 'Unlocking Potential' participants responding to the relevant question on the survey said that the resources were useful or very useful;
- 10 out of the 14 'Be Bold' participants who responded to the relevant survey question, said they were very or reasonably likely to recommend the course to others. All of the four 'Unlocking Potential' participants who responded to the same question in the survey said that they were likely to recommend the course to others.

'I think the course covers a number of beneficial areas and has a wealth of tools for individuals and managers to access. The plans are to meet with each of the candidates soon to discuss what they have learnt from the course and how to apply it.'

7.3 What difference did the PiPs programme make?

The survey and interviews both asked participants to identify any changes in the way they thought, felt or acted in relation to their careers. They also asked managers whether they had changed their behaviour and/or noticed any changes in the staff they manage, at a broader team or organisational level.

For participants on 'Be Bold', there were some indications from the survey about changes in the way individuals felt, thought and acted in relation to their work and career. For example:

- 14 out of the 18 'Be Bold' participants who responded to the survey felt empowered to take action about their career development having done the course;
- 12 out of the 18 felt more inclined to develop their career with their existing employer;
- 11 out of the 18 had started to, or had already taken action to, take on new responsibilities or more complex tasks in their current job;
- 10 out of the 18 had either started to, or taken action to talk to their manager or someone else about developing their career;
- 10 out of the 18 had started to, or had found ways to, apply their existing skills to do their job more effectively;

- 10 out of the 18 had started to share work-related knowledge more widely inside and outside their organisation;
- 9 out of the 18 said that they had started to, or had already, suggested ideas on new ways of working;
- 9 out of the 18 felt that they had begun to establish a more open and trusting relationship with their manager;
- 8 out of the 18 felt that they had started to, or had already, better understood the opportunities to develop and progress in their organisation;
- 8 had begun to widen their networks;
- 6 out of the 18 felt more motivated to do their job really well;
- 4 out of the 18 had clarified their career direction, and another 4 felt they were starting to do that

The research interviews with participants also highlighted some interesting changes in the way individuals thought about and started to act to develop their work and career. Key themes that emerged included:

- Greater confidence to do a range of things, from putting forwards ideas, requests for development, initiating and having better conversations about work with managers and (potential) clients;
- A sense of opening opportunities for staff, and a greater agency amongst staff in pursuing opportunities to grow and contribute more in a variety of ways;
- Greater awareness of the importance of networks, and how they might be built internally and externally; and
- A greater inclination and capability amongst managers to support their staff through more open and enabling conversations.

Involvement in the programme had encouraged participants to take a step back and reflect more carefully on the actions that they may need to take to develop their work and career, and indeed to support others.

'It's reminded me that I need to remain curious. Because it's very easy just to get dragged into those immediate pressures of work and how important, generally, it is in your life to take a moment and look up.'

Manager in law firm and participant in 'Unlocking Potential'

The course has made another employee realise she needs to think about what she wants to do, make decisions and make a plan of how to do it. There are options she needs to consider in the near future as there may be opportunities coming at work. This may include flagging areas she needs to work on and improve, to have an idea of how to present herself and how to approach people to let them know what she's thinking and ask for their support. (Employee in a law firm and 'Be Bold' participant)

For some, the benefit from the course was in helping them have a more structured and focussed approach to their development, the implication being that such an approach was more likely to lead to success.

'It's encouraged me to take a more structured approach...there's a lot of planning and setting goals and not just setting goals but how you're going to achieve those goals which isn't something I've ever done before...I just had a vague idea of what to do, so my attitude in that regard has changed.'

Employee of law firm and participant on 'Be Bold'

'It was the 'Be Bold' course, completely. It's given me time to sit and think about the goals I want to set for the near future, not just the long term future...Beforehand, I would have just thought "I don't need to set goal, that's fine, I just need to get on with it." But actually, by setting goals, it's really good for professional development and assists me in my role.'

Employee in law firm and participant on 'Be Bold'

For a number of the participants, the programme had a positive impact on their confidence. This could translate into greater confidence to give their views and opinions, to put themselves forward for development opportunities, and to embark on taking qualifications in their area of work. 14 out of the 18 'Be Bold' participants who responded to the survey reported that they had felt empowered to take action to develop their careers following their involvement in the course. One employee from a Law firm who had been in-role for a significant period of time realised that, through lack of confidence, she had not made decisions to pursue training that could benefit her career. She had always felt confident in her role but had never taken the leap to undertake the qualifications that go with the role. This is changing as a consequence of 'Be Bold'.

'I've definitely been putting forward my thoughts and feelings more about how I could assist the firm, or how this might work than something that's already put in place. So it has given me a lot of confidence.'

Employee in law firm and participant on 'Be Bold'

'Before [the course] I was just a little bit scared that my opinion and thoughts weren't important. Not from anyone else telling me they weren't, but just my own negative self-image. But actually, this course has boosted my self-confidence. Well, it's in the title isn't it – it's 'Be Bold'. It has actually made me be bolder and think, actually, if I want to get anywhere in my career I have to try to put forward my opinion.'

Employee in law firm and participant on 'Be Bold'

'It just taught me that people are worth approaching about this, that if you want it then it's worth speaking up about these things' – e.g. an employee applying to do a qualification.'

Employee in law firm and 'Be Bold' participant

One employee and participant on 'Be Bold' felt that the programme had enabled them to become better at expressing her thoughts and enabling her to have a voice at work. She also reflected on the impact this has had on her ability to demonstrate leadership in the organisation, even though she herself does not hold a position of authority.

'I think that (being better able to express the thinking behind her opinion) would have more impact than just me giving my opinion.' She is more able to 'lead from the position she is in' in an authentic way. 'You don't have to be in charge of lots of people to be a leader.'

Employee in an IT firm and participant of 'Be Bold'

The programme also helped individuals develop a different way of having conversations, facilitating and enabling others to solve problems for themselves rather than jumping in and fixing the problem. For those who manage staff, this is a potentially significant change in leadership capability.

'The temptation sometimes when you don't have time is to give people solutions rather than ask questions and let them do the thinking.'

'Unlocking Potential' webinar participant, March 2019

'My experience of the recent conversations held was I switched hat through a variety of these approaches with feedback giver, mentor, confidence builder and coach.'

'Unlocking Potential' webinar participant, April 2019

Interestingly, participation on 'Unlocking Potential' led some managers to realise that they were already having conversations of this nature informally, but that they had not appreciated that they were doing this. So, in a sense, this may be seen as a move from unconscious competence to a more conscious competence.

The programme was also perceived as facilitating conversations that were perhaps more exploratory than in the past, and which enabled people to identify new ways of developing their careers inside their current organisation.

One firm runs two tracks on careers development: management and master. One thing that came up during conversations with employees was that some don't want to go up, but sideways. Therefore, conversations looked at transferable skills that can be used elsewhere in the organisation. Now they are looking at how that career path can develop. Although this was 'probably' happening before by chance, they weren't aware of it before the course in their department.

The project has given the organisation more tools for enabling conversations between managers and employees in the organisation. They now see themselves exploring what is being discussed. By doing so, they have been asking more questions, delving deeper, and really nailing down people's perceptions of their abilities.

They recently had a conversation with somebody who wants to move sideways, has transferable skills but isn't quite ready for the role. They have applied for the role a few times now and haven't been successful. So they had a conversation with them to take a deeper delve into why that particular job was of interest. By doing so, they found that some aspects of the role they liked the look of could be used in other roles in the business that they can apply for.

Learning and Organisational Development Specialist, 'Be Bold' participant

Other managers who participated talked about the programme providing structures and skills that helped them have development conversations with their staff.

Other participants talked about the relationship between line managers and staff benefiting from the programme, in terms of more frequent conversations around careers, and a growing confidence amongst managers to have conversations about development with the staff they manage. Indeed, 6 out of the 10 managers responding to the survey said that they were more confident in talking with their staff about career and professional development.

'I think that I might have been a little bit enthusiastic about expecting immediate and enthusiastic buy-in, changes and big insights. Whereas I expect that this is the kind of thing that, at the most basic level, is a reminder to both of us that our relationship matters, that her career matters, and that she is aware that her career matters to me and I have a responsibility to keep those conversations going on a regular basis.'

Manager in law firm and participant in 'Unlocking Potential'

'Yes, conversations are proving very helpful and have highlighted new things I had not thought about before.'

'Be Bold' Webinar Participant

'I think, due to the course, the conversation around career development came up more so.'

Learning and OD Specialist, 'Be Bold' Participant

The survey of 'Unlocking Potential' Participants, whilst having very low returns, reflected and mirrored some of the comments from the interviews. For example:

- 6 out of the 10 managers responding to the survey said that they had supported their staff to take on more complex roles and responsibilities;
- The same number said that they had helped their staff to identify opportunities to develop their skills and capabilities;
- 7 out of 10 had initiated conversations with their staff about their career and wider development;

A number of participants spoke about the programme increasing the awareness of the need for, and supporting the development of, networks. One 'Be Bold' participant from a Law Firm talked about using LinkedIn more, and more widely a greater focus on connecting with others in their industry. Another 'Be Bold' participant felt that the 'elevator pitch tool' used on the programme helped them to better describe who they are, what they do in a succinct way when talking to prospective clients. 'Be Bold' had also enabled the participant to become a 'positive ambassador' for the organisation. So, in some senses, this type of impact goes beyond networking to being able to engage productively with potential clients and potentially generate income for the business. For another law firm employee who participated in 'Be Bold', an increased attention paid to networking was more about internal relationship building within the organisation.

For managers, there was a perception that involvement in the 'Be Bold' programme had enabled employees to think about their strengths more, what more they could do to support themselves and the business, and to put themselves forward more for opportunities and greater responsibilities. There was also a view expressed that participation had encouraged employees to be more open and willing to suggest new ideas, a potential benefit in terms of innovation and organisational performance.

'They talk openly daily about new things so they don't talk any more than before but it's opened their eyes a little more. They're a lot more open and willing to suggest new things and things they can take on, thinking a bit more. It gives them more awareness that they can progress their careers although they're part time, and knowing they're capable.'

Director, law firm, 'Unlocking Potential' participant

'So even though she hasn't said so, I suspect that the impact of the course has made her think "gosh, this is my career, I better be more proactive and not just wait for work to come in". So I suspect it's had a positive impact.'

Manager in law firm and participant in 'Unlocking Potential'

In addition to the impacts discussed above, there were also examples of perhaps more tangible benefits for participants. For example, a handful of participants had been promoted, partly as a consequence of their involvement in the programme.

'One employee has just got a promotion this week. They think that it's definitely' down to the course doing the swot analysis and being able to demonstrate their strengths.'

Learning and OD Specialist, 'Be Bold' participant

Another participant applied for a promotion following involvement in the course. One senior stakeholder from an organisation involved in the programme reported that every candidate who applied for an internal promotion had been successful and had agreed to work towards a set of objectives over the coming quarter.

At the organisational level, a benefit of involvement expressed by employees was the message it communicated that the organisation was keen and interested in supporting people to develop, and conversations about their career are important.

One key stakeholder and 'Be Bold' participant felt that those employees who had participated in the programme were highly engaged as a result.

'I think those who have done the course are highly engaged.'

Learning and OD Specialist, 'Be Bold' participant

One manager talked about the potential links between the course and the company PDP process, and how that could be made company-wide.

'She will need support from her line manager and one of her next steps is to approach her to talk about the course and 'wants to keep the momentum of it and include it as part of her PDPs,

which is something company-wide that could be done, so perhaps that's something from this course that could be added to keep those good habits going year on year.'

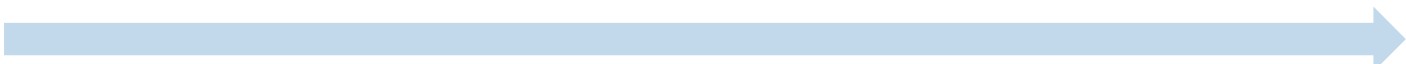
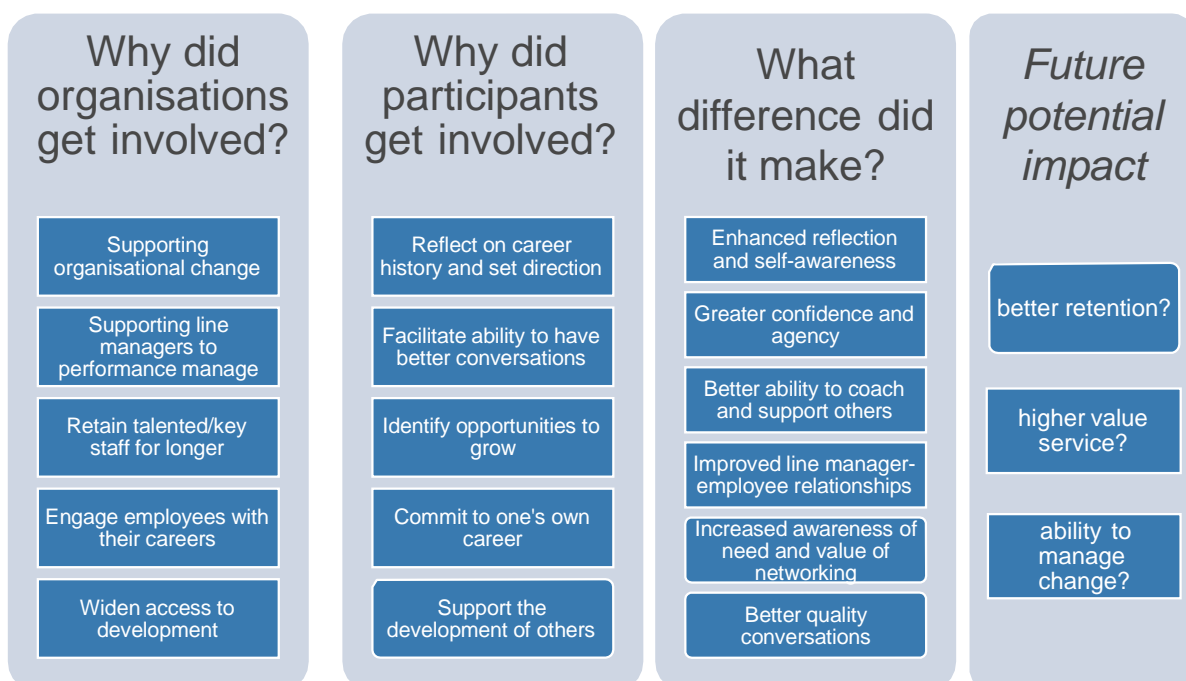
Marketing Manager in law firm, 'Be Bold' and 'Unlocking Potential' participant

One example emerged of a tangible business idea that could save significant sums of money for the business. One participant was encouraged to talk to their manager about opportunities for adopting new software that could speed up existing processes and help the business go paperless. This could potentially save thousands of pounds per year. What is interesting about the example, perhaps, is not simply the potential cost savings but the willingness of employees to be more willing to come forward with ideas.

SMEs are often concerned that if they invest in the development of staff, they will facilitate their leaving with a concomitant loss of knowledge, skills and experience and an ultimately detrimental impact on the business. On balance, it seems that participation in the programme was more likely to incline participants to develop their career with their current employer. Only one 'Be Bold' participant said they would be moving to a new role in a different organisation.

To summarise the ranges of reasons for getting involved in the programme, and the benefits (for both individuals and organisations), we have mapped these below visually. These can be mapped onto our original theory of change to assess where there is, and is not, indicative evidence to support the theory of change, and ultimately help inform the approach to any future, more robust trials of the programme.

The third column illustrating some of the impacts of the programme are illustrative, both in the sense that the number of participants we were able to speak with was quite small and that those represented do not cover all of the impacts, but those which seemed most prominent from our conversations. The far right hand column illustrates some impacts not yet realised which those we interviewed spoke of as potential impacts in the future.



7.4 Barriers

There were some potential barriers identified by participants themselves to getting the most out of the programme, and continuing to the end. These included the self-discipline required to initiate and stick with the course, but also issues of workload. One manager in a law firm referenced Heads of Department in the business being overloaded and so although it would be useful for them to get involved in using tools from the programme, their workload was seen as a potential barrier.

'It is a sometimes a struggle to motivate yourself to do something and the 'Be Bold' course was a perfect example of it. Whilst it's useful to have something like this course in place, you do need to have that self-discipline. Once you have that self-discipline and just sit down and do it, then it's so beneficial to your own development and, in turn, it's going to help you in whatever firm you're working in.'

Employee in law firm and participant on 'Be Bold'

7.5 Return on Investment

The short-term nature and purpose of this 'proof of concept' obviously doesn't allow any formal cost-benefit analysis. However the findings do indicate the nature of the benefits, and useful insight into the effort (and associated cost) required to manage an intervention.

By its nature, the 'Be Bold' and 'Unlocking Potential' programmes are designed to be relatively low-cost and scalable. However the complexity of reaching SMEs, and the effort required to help them manage the programme, as well as benefit from it, add costs.

At this stage, if we are willing to make some very broad estimates, we can use this as an indicator of how great the benefit would need to be, to firms or to other stakeholders (including government) to justify the cost on an ongoing basis. From this trial we know:

- The funded cost of the intervention was just under £60k, between two organisations. This enabled recruitment of the participating SMEs, managing the programme, and evaluating the results. (The funding was an at-cost reimbursement, at best).
- The in-kind support from The Career Innovation Company was around £45,000 (the 'Be Bold' programme is publicly priced at £225 per participant, and we had around 200 registered participants if we include the manager programme).

The total cost of the programme could therefore be considered to be around £105k (noting that the actual future cost of programme support could be greater). If we then only count the participants who completed the programme (62 across 11 SMEs), the investment per participant was c.£1.7k, and the average cost per firm just under £10k, excluding their own internal costs. A target ROI per organization would therefore need to be substantially in excess of this amount.

8 Conclusions and Recommendations

The purpose of this project was to explore the potential possibilities and benefits of introducing an online career development programme within SMEs in the professional services sector. In particular, the project was interested to explore whether such an intervention might helpfully support productivity growth within those organisations. Given the short timeframes for the project, it was not expected that measurable change in productivity would be achieved, more that glimmers of changes in ways of working that could result in changes in productivity might be seen.

There were three key objectives, outlined at the start of this report, namely to:

- Test whether the ‘Be Bold’ programme demonstrated positive impact on intermediate indicators of productivity in SME professional service firms (positive changes have been demonstrated by The Career Innovation Company for larger firms, and there is an interest in whether similar results can be obtained in the SME context);
- Assess whether complementary support for managers, in the shape of the ‘Unlocking Potential’ programme, was necessary for, or enhanced the impact of, the ‘Be Bold’ programme;
- Identify whether, and how, there is value in a more robust large-scale trial of the PiPS project conducted over a longer period of time and with the capability of demonstrating impacts on quantifiable productivity measures.”

Does ‘Be Bold’ demonstrate positive impact on intermediate indicators of productivity in SME professional service firms?

- It’s clear from the interviews with, and survey returns from, ‘Be Bold’ participants that they experienced a range of positive impacts from their involvement, largely in line with the theory of change developed at the beginning of the project.
- For ‘Be Bold’ participants, positive impacts included a growing confidence and agency to take steps to grow their work and career. This could manifest itself in a number of ways from being more prepared to put across one’s ideas, seek development opportunities, as well as take on more responsibilities and complex roles at work, as well as do their existing work more effectively. These latter impacts clearly have a potential link to greater measurable productivity gains over time if individuals are engaged in higher value work as a result of their engagement in the programme. The increased willingness to develop skills, put forward ideas and to exchange work-related information are also behaviours that could ultimately lead to increased productivity at both an individual, and organisational level, particularly if those ideas lead to real changes in organisational practice (as was the case discussed by one participant).
- It is also clear that the emotional component of the theory of change mattered, with descriptions of greater motivation and confidence featuring strongly.

- Whilst 'Be Bold' participants described impacts in confidence and agency, fewer reported greater clarity in career direction. This may be expected, given that this impact is likely to take longer to realise. So, one could quite easily conceptualise the range of impacts of a programme like this as happening over different time frames with some taking longer to emerge. It has been the case from the inception of this project that the short timeframe was likely to make it impossible to identify and track the full impacts of the programme. An evaluation of a longer timeframe might be able to do so.
- The willingness and ability to have more, and different, types of conversation emerges relatively strongly from the evidence. This applies to both staff and managers. The former have reported being more willing to approach their managers and others to explore opportunities, and the latter equally seem more open to it.
- The changing nature of conversations supported by the programme has, it seems, in some cases led to the identification of ways in which individuals can expand their responsibilities, identify opportunities within the firm, and contribute more without necessarily progressing up a hierarchy. This is potentially of real importance given the limited room for upward movement within small firms, and the need for this not to translate into lack of opportunities to grow.
- A further impact has been in a number of cases, and perhaps as a consequence of more and different conversations taking place, more open and trusting relationships between managers and the staff they manage.

Assess whether complementary support for managers, in the shape of the 'Unlocking Potential' programme, was necessary for, or enhanced the impact of, the 'Be Bold' programme

- 'Unlocking Potential' participants reported a range of positive impacts, in particular a greater willingness and confidence to have open and developmental conversations with the staff they manage. Having better conversations about development may also open doors to more open conversations about other workplace issues, such as performance problems, health and wellbeing, and organisational change for example. They also reported being more willing and able to identify development opportunities (often within the firm) and to support their staff take on more complex roles and responsibilities.
- It does seem that the manager component of the intervention, 'Unlocking Potential', did add something very useful. In a sense, whilst not explicitly emerging in the data, there is both a greater sense of 'permission' being given alongside more enabling conversations in which possibilities are explored. As noted previously, the manager-employee relationship is reported by some to have benefited from this.
- Anecdotally, the act of SMEs investing in the development of their staff can feel a risky decision to take, opening up the possibility of losing valued members of staff. Interestingly, again from the limited data we have, this does not seem to be the case here. On balance, participants seemed more inclined to develop their careers within their organisation rather than seek roles outside. Indeed, in one organisation's case, involvement in the programme was explicitly about aiding retention of valued staff, and the evaluation supports that the typical impact of the programme is in line with this corporate expectation.

Identify whether, and how, there is value in a more robust large-scale trial of the PiPS project conducted over a longer period of time and with the capability of demonstrating impacts on quantifiable productivity measures

- Whilst the programme has demonstrated benefits for both staff and managers, and it seems that there is value in the intervention in terms of its links to intermediate indicators of productivity, there have been challenges in securing the participation of SMEs both in the programme and the evaluation. These raise questions about how any future programme, and its evaluation, could address such challenges (see below).
- Engaging intermediaries and ultimately SMEs in the programme has proved challenging. That said, much has been learnt along the way about how, in future, it may be best to reach out to and engage SMEs in an intervention such as this. In the case of intermediaries, a longer timeframe to build relationships and navigate sometimes complex governance procedures would be valuable in any future project.
- The project secured the participation of eleven SMEs. Reflecting on the engagement with SMEs, there were many aspects of the programme that were attractive to them. The flexibility in how it could be used by participants, and the range of issues it could be used to help address. There are also lessons as to how any future programme and/or evaluation may recruit SMEs to the programme. For example, the timescale for the engagement and recruitment of SMEs in the current project was most likely too short, and a longer period would have been useful to facilitate gaining buy-in. It was also the case that SME firms needed more hand-holding and one-to-one support to understand the programme, its benefits, and how to align with the firm's existing strategy. So, in future, planning for that additional resource and time would need to be allowed for. It may also be the case that some of the messages to attract SMEs could usefully be adapted to focus less on productivity (a word which may not resonate in many SMEs) and more on how the programme helps staff to grow and contribute more, and can improve organisational performance.
- Having secured the participation of SMEs in the programme, recruitment of participants to the programme was relatively easier, though still difficult. The interviews conducted, and more broadly our conversations and experience through the project, have highlighted the busy nature of SMEs, and the challenge individuals often face in making time for development alongside their busy roles. The design of the programme does, however, help facilitate involvement through its modular design and the flexibility with which individuals can access and use the resources.
- Participation in the evaluation has been low. It has proved hard to recruit individuals to participate in interviews and surveys to assess how the programme has impacted them. This may reflect a number of issues including lack of available time amongst participants, the relatively low investment nature of the intervention, and the short window in which the evaluation itself took place. As a result of the low response, and potential response bias (those most engaged – and benefiting most - may have been those responding to the evaluation) the results should be regarded as qualitative, rather than quantitative. They are sufficient to validate the theory of change, but not to make a robust business case with estimated return-on-investment.

Potential for future trials

Given all of the above, what would be useful next steps? One option would be to start with a small-scale trial to test marketing methods and messages, focused on intermediaries as part of the programme structure, and on a geographical or local community (e.g. coordinated by an LEP) to maximise local marketing. So, in a sense, a trial in which SME engagement methods are the main focus. A further, follow-on option would be to then test the intervention with a larger group over a longer timeframe to see whether the intermediate impacts identified in the study do, in fact, translate to much longer term changes in outcomes, including productivity.

■ STEP 1: Testing methods of engagement

- Testing the models of working with intermediaries - identify a sample of different types of intermediary, and undertake a compare and contrast of locations, their purpose, their funding, their reach and scope; undertake work with each over a specified period of time to understand what effort over what period of time is required to achieve what sort of traction with them and those to whom they are the conduit. This would essentially lead to an understanding of the 'conditions for success' for working through intermediaries which would apply to a range of different types of initiative.
- Testing marketing-based, design-led and 'nudge' or 'behavioural insights' approaches to engaging SMEs in productivity interventions like this. IES has studied such approaches (Ref: Department of Energy & Climate Change - 'ORGANISER: A behavioural approach for influencing organisations). In this case the approach would include identifying the SME's relationships (e.g. customers) and aligning the initiative with these, introducing an element of competition, aligning the initiative (and language) with the SME's culture and sense of identity (e.g. as an innovator, or as an upholder of certain values), understanding decision-making (to influence them), and influencing via trusted sources.

■ STEP 2: Testing over a longer period

- Testing the intervention with a larger group over a longer timeframe to see whether the intermediate impacts identified in the study do, in fact, translate to longer term changes in outcomes including productivity. This could include cost-benefit analysis. An issue here would be maintaining motivation and momentum over time, beyond the delivery window of the 'Be Bold' and 'Unlocking Potential'.
- A trial of how to sustain the conditions for success and engagement over a longer period of time. This would also align well with professional bodies' desire to retain active members beyond the first five years (e.g. ongoing CPD and networking).
- Comparing efficacy of relying on individual self motivation with support from employer and from other bodies (professional bodies, enhancement agencies, banks etc.). This model requires a long time to build the underpinning relationships (see observations about governance priorities and timing in the evaluation report), as well as a longer timeframe for support for and evaluation of long-term impact.
- And potentially: longitudinal studies (over years) to plot the evolution of relationships, changes in practice, and sustained positive impact on 'productivity'. The evident value of this would need to be sufficient to justify the effort required.

Appendices

Appendix 1: Interview discussion guides

The Career Innovation Company 'Be Bold in your Career' course Employee Discussion Guide

Introduction

Thank you for agreeing to participate in this research.

Interview record

Researcher name:

Date:

Interviewee number:

Introduction

Thank you for agreeing to participate in an interview about the 'Be Bold' course.

We hope to cover three main topics within the course of our discussion. These are:

- **Your experience of doing the 'Be Bold' course**
- **Any changes you have noticed since completing the course**
- **The impact of the 'Be Bold' course**

Our purpose in conducting the interview is to understand if, and how, a career development course such as 'Be Bold' might support small and medium-sized organisations, and their employees, to be more productive.

The findings from our interviews will be used by IES and Career Innovation for research purposes. The interviews will be recorded, with your consent to support analysis by our research team. The recordings will be held within the IES research team, stored securely and deleted at the end of the project. In accordance with General Data Protection Regulation (GDPR) any personal data and data from interviews will be kept securely by the Institute for Employment Studies (IES). We may use quotes from the interview in a final research report. We will present the quotes in such a way that you cannot be identified.

No-one outside of the IES research team and the Career Innovation project team will listen to the recordings or see notes or transcripts. Are you happy for me to record the interview today?

The interview will take 30-45 minutes. You do not have to answer a question if you do not wish to and you may stop the interview at any time if you do not want to continue.

Do you have any questions about the interview or the research? Are you happy to go ahead with the interview?

Background

What is your name; job title and role remit please?

Briefly describe your organisation/work?

Do you manage staff within your organisation?

Experience of the 'Be Bold' course

1. Why did you decide to get involved in the 'Be Bold' course? What were your objectives? Have these changed during the course?
2. What changes did you hope to achieve as a result of your involvement with the course?
3. Which elements of the course did you find most useful? Why do you say that?
4. Did your manager initiate conversations with you about your experience and learning from the course?

Changes since doing the course

5. **Overall, has your involvement in the 'Be Bold' course changed the way you feel, think or act in relation to your job or professional development?**

Probe for any changes in motivation/engagement with either their job, organisation, own career

Probe for any changes in their willingness to talk with their manager about their role/career, or a wider network of people who can provide support in developing their career

Probe for any changes in their willingness/actions taken to learn new skills/apply existing skills in ways that enable them to do their job better

Probe for any changes in their willingness/capability to suggest new ideas, better ways of working, support colleagues to work more effectively

Probe for any willingness/actions to take on new responsibilities, do more complex tasks

Probe for willingness/actions to share work-related knowledge inside/outside their organisation

Probe for willingness/actions taken to move to a different role in current organisation (potentially a different one)

6. **(i) What have been the main benefits for you of participating in the 'Be Bold' course?**

Probe for whether it has helped them, in their view, be more productive at work (has it helped them do their work more effectively/do higher value, more complex work, build confidence to 'step' forward and take on more responsibility, advocate ideas for business improvements/innovations)

- (ii) What have been the main benefits, do you think, for your firm?**

Probe for whether your involvement in the course has made a difference to your team /organisation's performance (for example, through your ability to suggest new ways of working, building of better networks etc.) Probe to see whether any of this is quantifiable (cost savings etc.)

7. How confident did you feel about talking to your manager about your career or professional development before you started the course?
8. **What changes have you noticed in how you manage your career/professional development since your involvement with the course? (E.g. have you become more confident in seeking a conversation about your career with your manager?)**

Future intentions and next steps

9. **What actions are you thinking you might take in the coming months to develop in your work/career?**
This could include seeking out opportunities for taking on additional responsibilities, new training, skill development; seeking out new roles/job opportunities within or outside their current organisation; speaking to their manager or others in their network who may be able to help develop their career; looking for shadowing, placement or secondment opportunities; taking steps to grow their network etc.
10. **What has led you to think about taking these actions? Was involvement in 'Be Bold' a factor?**
11. What do you think has stopped you getting the most out of the 'Be Bold' course?
12. To what extent do you have opportunities to progress in your job/organisation? Has your perception of opportunities to progress changed since your involvement with 'Be Bold'?

Next steps

13. **What would help you to move forward in your career, be your best at work and continue to grow professionally?**
14. **Is there anything you would like to add or think we should know?**

Thank you and close.

The Career Innovation Company 'Be Bold in your Career' & 'Unlocking Potential' management stream evaluation Manager Discussion Guide

Introduction

Thank you for agreeing to participate in this research.

Interview record

Researcher name:

Date:

Interviewee number:

Introduction

Thank you for agreeing to participate in an interview about the overall 'Be Bold' programme, and your experience of the 'Unlocking Potential' management stream of support (which was part of Productivity in Professional Services Firms PiPS).

We hope to cover four main topics within the course of our discussion. These are:

- **Your experience of doing the 'Be Bold' course (if applicable) and/or the support provided to fulfil your role via the 'Unlocking Potential' management briefings and resources.**
- **Any changes you are aware of in yourself since completing the programme.**
- **Any changes you have noticed in your employees since they have completed the 'Be Bold' programme.**
- **The impact of the 'Be Bold', 'Unlocking Potential' and the overall PiPS project on you, your employees and your firm.**

Our purpose in conducting the interview is to understand if, and how, a career and professional development programme such as 'Be Bold' might support small and medium-sized professional services firms, and their employees, to be more productive.

The findings from our interviews will be used by IES and The Career Innovation Company for research purposes. The interviews will be recorded, with your consent and used to support analysis by our research team. The recordings will be held within the IES research team, stored securely and deleted at the end of the project. In accordance with General Data Protection Regulation (GDPR) any personal data and data from interviews will be kept securely by the Institute for Employment Studies (IES). We may use quotes from the interview in a final research report. We will present the quotes in such a way that you cannot be identified.

No-one outside of the IES research team and The Career Innovation Company project team will listen to the recordings or see notes or transcripts. Are you happy for me to record the interview today?

The interview will take 30-45 minutes. You do not have to answer a question if you do not wish to and you may stop the interview at any time if you do not want to continue.

Do you have any questions about the interview or the research? Are you happy to go ahead with the interview?

Background

What is your name; job title and role remit please?

Briefly describe your organisation/work?

Did you participate in the 'Be Bold' course, the 'Unlocking Potential' management stream, or both?

If the manager has only had experience of the 'Unlocking Potential' management stream then ask questions 6-21.

If the manager has had experience of both the 'Be Bold' course and 'Unlocking Potential' stream then ask ALL questions.

If the manager has only had experience of the Be Bold course then just ask questions 1-5 and questions 17-21.

Experience of the 'Be Bold' course

1. Why did you decide to get involved in the course? What were your objectives? Have these changed during the course?
2. What changes did you hope to achieve as a result of your involvement with the course?
3. Which elements of the course did you find most useful? Why do you say that?

Changes since doing the 'Be Bold' course

4. Overall, has your involvement in the course changed the way you feel, think or act in relation to your job, career or professional development?

Probe for any changes in motivation/engagement with either their job, organisation, own career

Probe for any changes in their willingness to talk with their manager about their role/career, or a wider network of people who can provide support in developing their career

Probe for any changes in their willingness/actions taken to learn new skills/apply existing skills in ways that enable them to do their job better

Probe for any changes in their willingness/capability to suggest new ideas, better ways of working, support colleagues to work more effectively

Probe for any willingness/actions to take on new responsibilities, do more complex tasks

Probe for willingness/actions to share work-related knowledge inside/outside their organisation

Probe for willingness/actions taken to move to a different role in current organisation (potentially a different one)

5. (i) What have been the main benefits for you of participating in the 'Be Bold' course?

Probe for whether it has helped them, in their view, be more productive at work (has it helped them do their work more effectively/do higher value, more complex work)

(ii)What have been the main benefits, do you think, for your firm?

Probe for whether your involvement in the programme has made a difference to your team /organisation's performance (for example, through your ability to suggest new ways of working, building of better networks etc.) Probe to see whether any of this is quantifiable (cost savings etc.)

Your role as a manager- 'Unlocking Potential' management stream

6. Why did you decide to get involved in the 'Unlocking Potential' management stream (part of overall PiPS project)? What were your objectives? Have these changed over the course of the PiPS project?
7. **What changes did you hope to achieve as a result of your involvement with the project?**
8. In what ways did you support your employees as they worked through the 'Be Bold' course?
E.g initiating conversations with them, asking for their feedback etc.
9. To what extent did your employees take a proactive approach in instigating conversations with you about their work or professional development triggered by the 'Be Bold' course?
10. What sort of conversations or actions has the course stimulated? Have these been beneficial or not?
11. Did the 'Unlocking Potential' resources add value to you? What was most useful and why (i.e on-line resources, live or recorded webinars, discussion forum, email briefings)?

Changes since participating in the PiPS project

12. How useful, overall, has been your participation in the PiPS project?

Probe for if, and how, the programme has helped them become more confident/able in having career conversations with your staff? Has it enabled them to better support the development of their staff?
13. What changes have you noticed in your leadership style or skills since your involvement with the project? (E.g. have you become more confident in initiating conversations about your employees' professional or career development?)
14. **What impact, if any, do you think you participating in the PiPS project has had on your own/team/organisation's performance?**

Impact of the 'Be Bold' and PiPS project on wider organisational performance

15. **As a manager in your firm, what impact, if any, do you think your organisation's involvement in the 'Be Bold'/PiPS project has had on the performance of your staff/team/ business performance?**

Probe for any changes in how they see their role in terms of supporting employees to develop/increased their awareness of how they might support the development of their staff/ given them greater skills and confidence to be able to support people.

Probe for any changes that they have noticed in the attitude/behaviour/actions of staff they manage (for example, have staff they manage been willing/shown interest in/or taken on more complex roles, responsibilities; sought new training and development opportunities; etc.)

Probe for any changes on any impacts in the way their team works/team performance

Probe for any impacts at an organisational level (e.g. projects initiated that may, for example, save costs; more engaged staff; greater sharing of knowledge/learning; retention of key staff etc.)

16. What do you think needs to be done to sustain the changes? What support do you need in order to do this?

Next steps

17. **What would help you to further support employees in their professional and career development now?**
18. Has the course made you feel differently about how you can support development and progression in your organisation?
19. Are there any barriers to change? In terms of resourcing, attitudes etc.?
20. We are interested in learning how other small and medium-sized organisations such as yours might be encouraged to get involved with the 'Be Bold'/PiPS programme. What, in your view, would encourage other organisations to participate? What worked well for you/your organisation? What could have worked better?
21. **Is there anything you would like to add or think we should know?**

Thank you and close.

Appendix 2: Snapshot of online surveys

'Be Bold' survey:

2. Your job title

Which best describes your position?

- Entry level/early career/getting qualified
- Work in support function
- Experienced specialist (non-manager)
- First-level leader/manager
- Mid-level leader/associate partner
- Senior leader/executive/partner
- Other (please describe)

3. Which of the following best reflects your career situation? Tick all that apply.

- In a new role, getting established
- Looking for career progression or challenge
- Managing the balance between work and personal life
- Responding to significant organisational changes
- Looking for a new role or changing career
- On a structured talent development programme
- Wanting to make a plan for my career and future development
- Helping others manage their career
- Other (please state)

7. Since you started the Be Bold course have you started to feel

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
More motivated to do your job really well?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More empowered to take action about your career and development?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More inclined to develop your career with your current employer?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Since you started the Be Bold course have you:

	Done nothing yet	Started to think about	Started to plan	Started to act on	Taken Action
Established a more open and trusting relationship with your manager?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talked to either your manager or someone else about developing your career?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Widened the network of people who can support your development and career?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understood the opportunities to progress and develop in your organisation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clarified your career direction or career goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Applied your existing skills to performing your job more effectively?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learned new skills, inside or outside work, to do your current job better?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supported your colleagues and team members in their work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sought out and suggested new ideas and better ways of working?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared work-related knowledge inside or outside of your organisation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taken on new responsibilities or more complex tasks in your current job?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learned new skills, inside or outside work, to support your career goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Looked for work shadowing, placement or secondment to gain experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moved to a different role within this organisation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moved to a different role with another organisation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

'Unlocking Potential' survey:

2. Your job title

Which best describes your position?

- First-level leader/manager
- Mid-level leader/associate Partner
- Senior leader/executive/ Partner
- Other (position)

3. Did you take part in the 'Be Bold in your Career' on-line course to support your own professional development?

- Yes
- No

4. To what extent did you find the manager focused 'Unlocking potential' support resources useful? E.g webinars, conversation tools, videos, information, regular email briefing

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Excellent | Good | Adequate | Poor | Didn't use them |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

5. Since you started the Be Bold course have you started to feel

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
More confident talking with your staff about their career and professional development?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More aware of how you might support that development of your staff?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More able to identify and secure opportunities for your staff to support their development?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Since the PiPS project began, I have taken steps to...

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Initiate conversations with my staff about their career or professional development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have more regular conversations with my staff about their work and their career development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help my staff to identify opportunities to develop their skills and capabilities e.g. on the job learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support my staff to take on more complex roles and responsibilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Are there any other ways in which you have supported your staff to develop their skills and career since your Firm participated in the PiPS programme?

8. Did you have staff that participated in the Be Bold programme?

- Yes
- No

9. In your view, has involvement in Be Bold/PiPS, supported your Firm to be more productive?

- Yes
- No
- Don't know

10. If we were to offer the project again what would make it more effective?

Appendix 3: Survey charts (with numbers)

'Be Bold' survey data

Figure 4 'Be Bold' participants career situations (n=18)

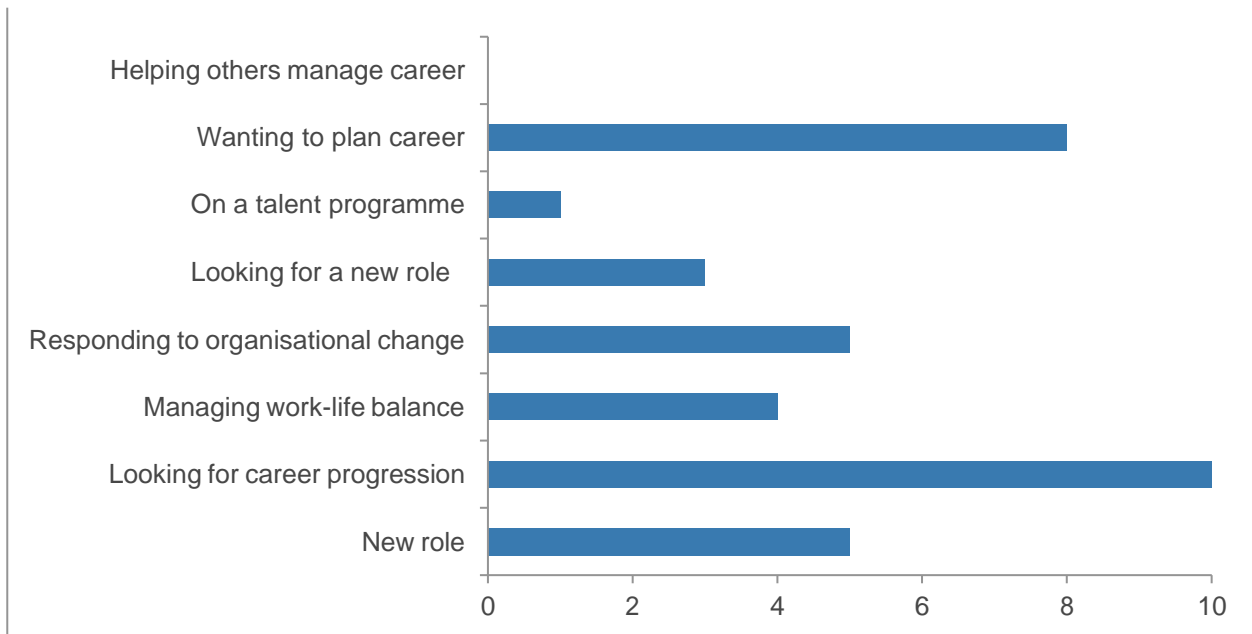


Figure 5 'Be Bold' participants changes in attitudes and behaviours (n=18)

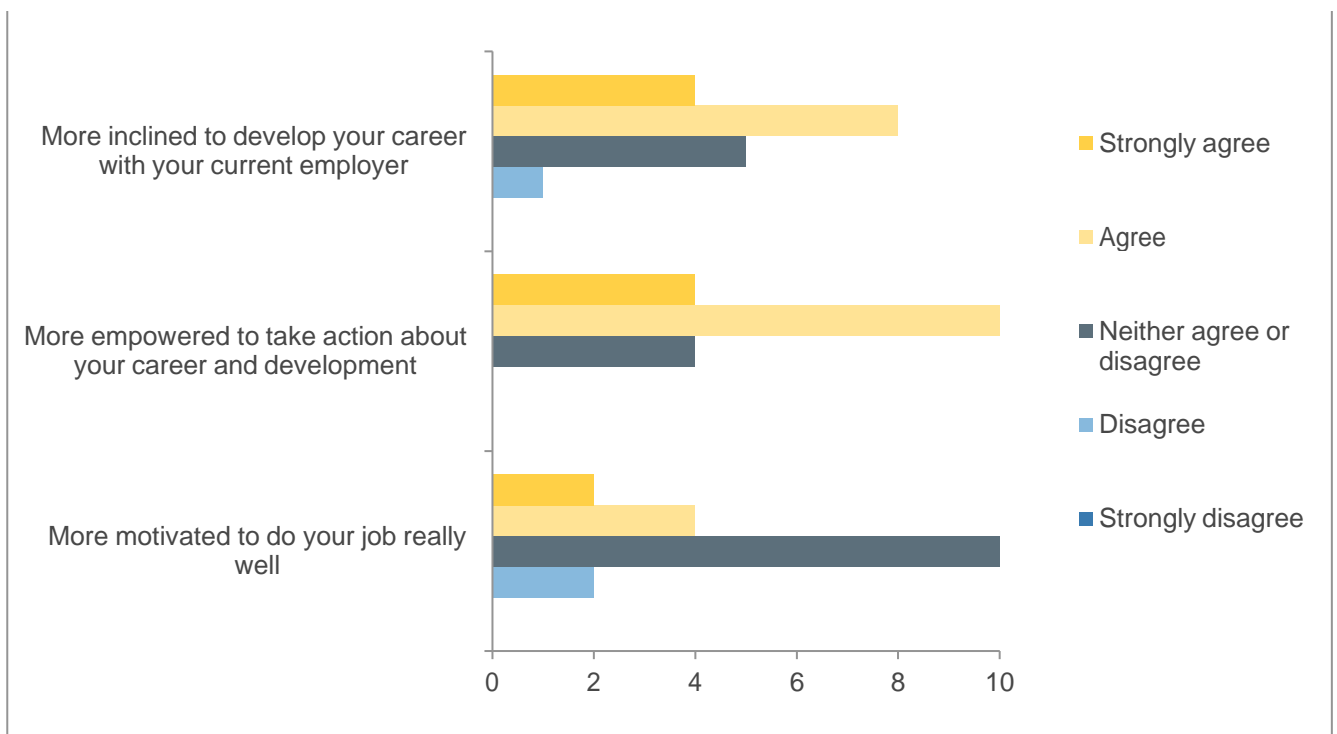
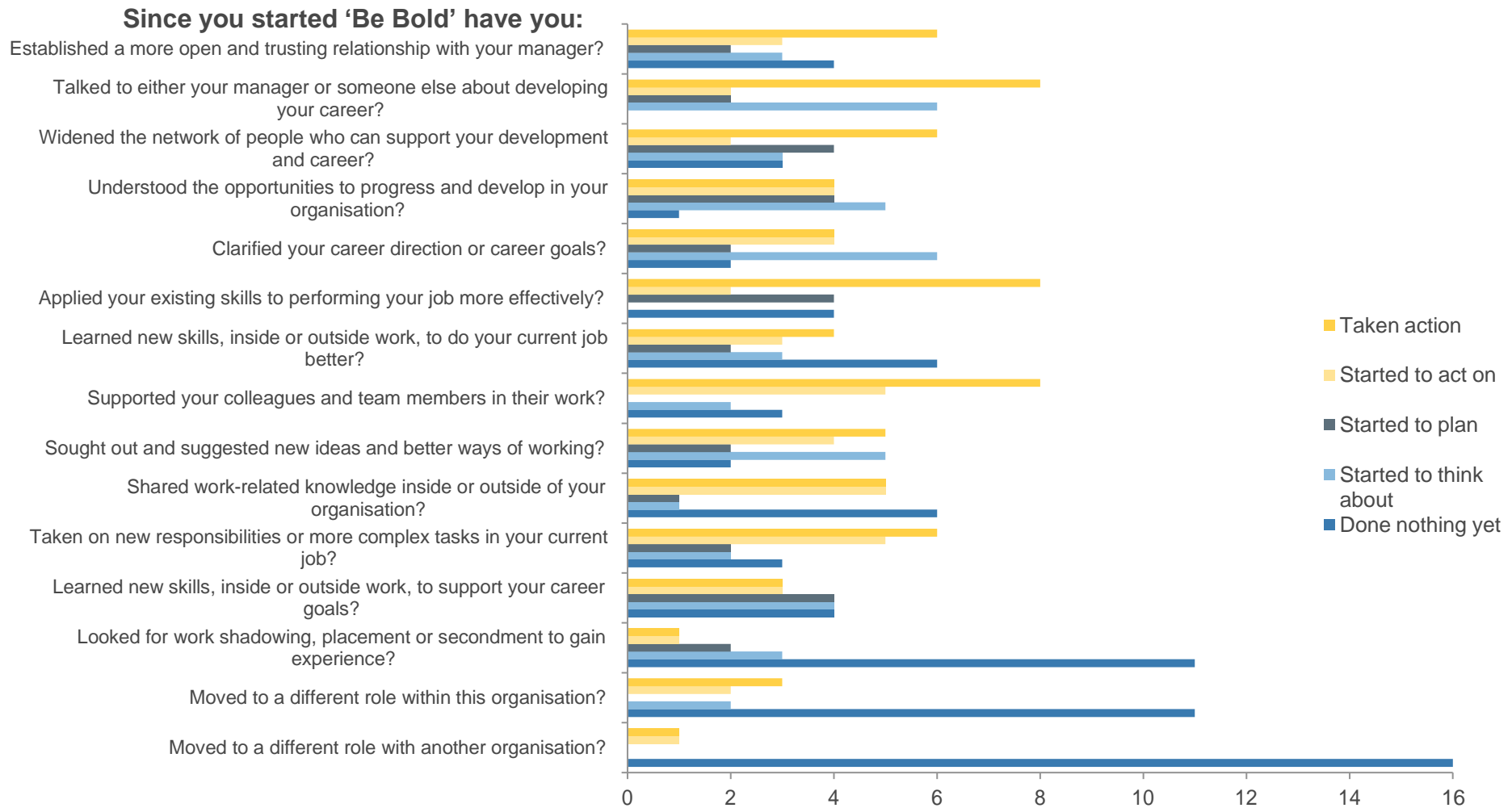


Figure 6 'Be Bold' participants summary of career behaviours (n=18)



'Unlocking Potential' survey data

Figure 7 Managers changes to attitudes and behaviours (n=10)

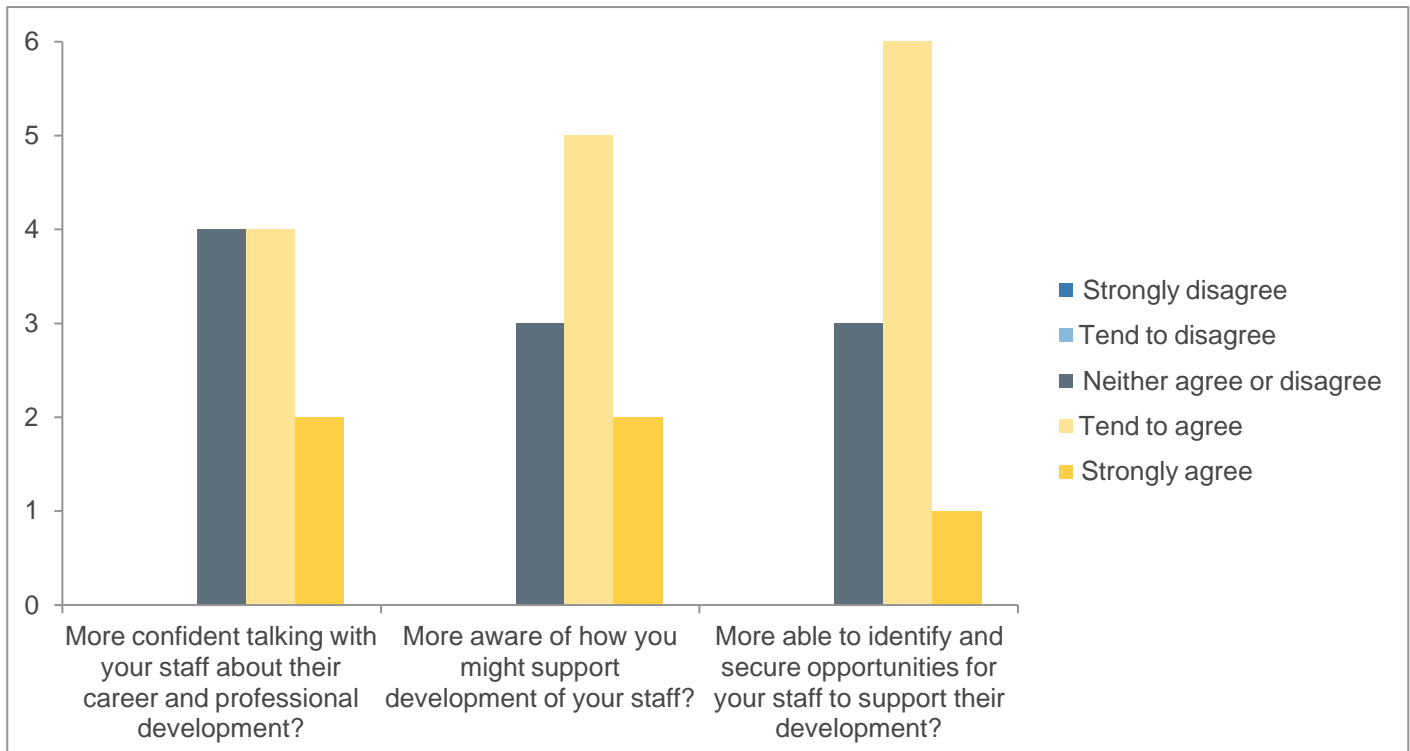


Figure 8 Managers summary career behaviours (n=10)

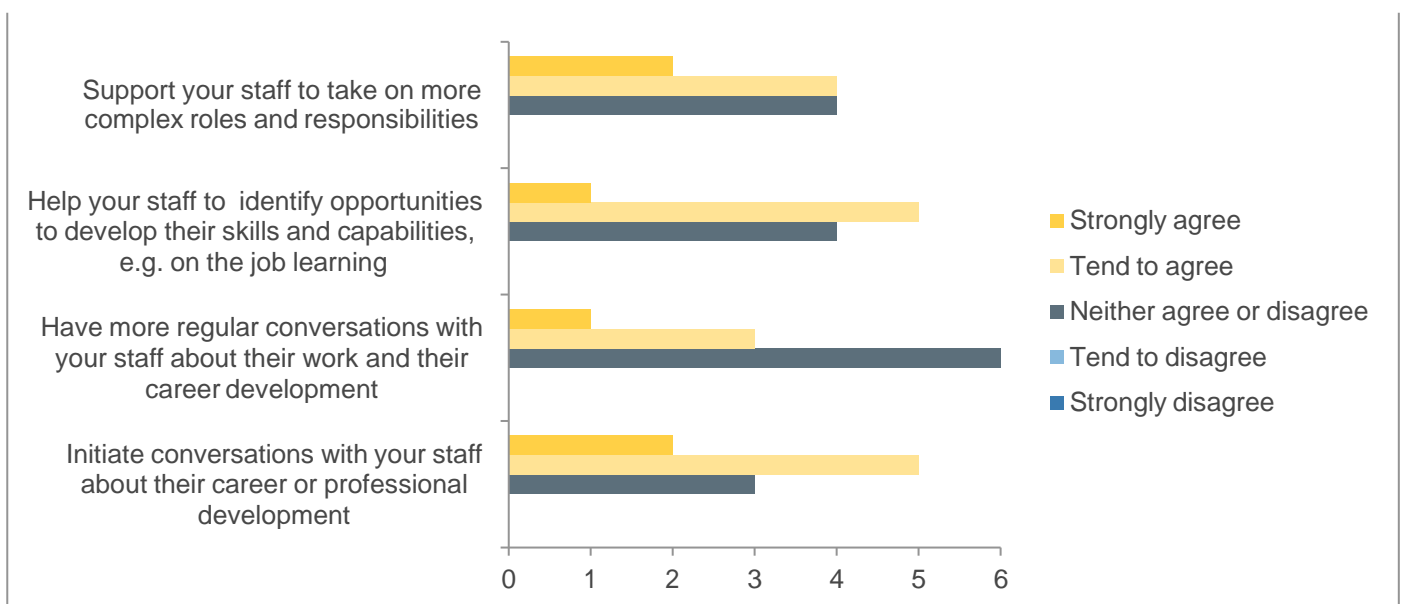
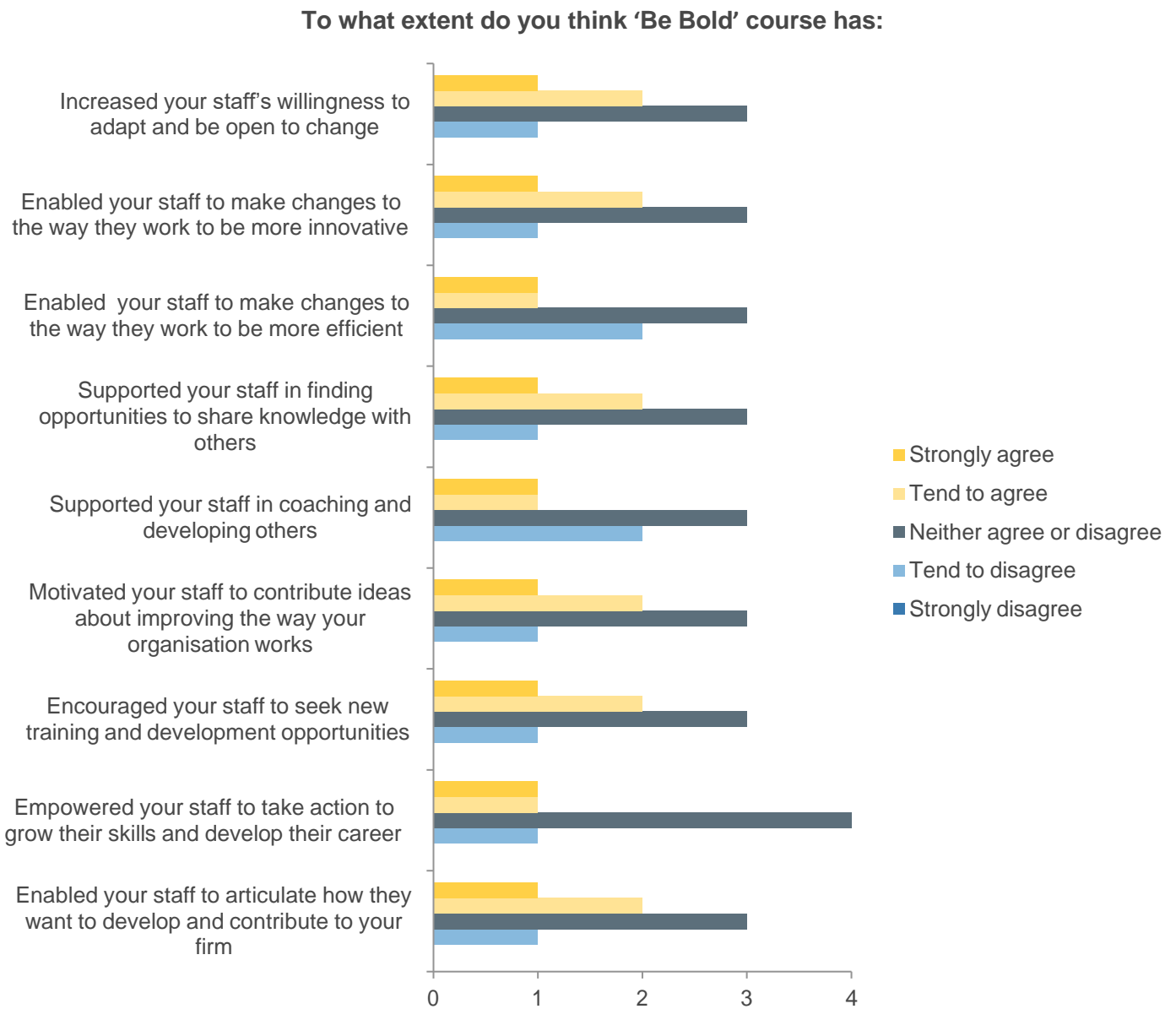


Figure 9 Managers' who had staff participating in the 'Be Bold' course – perceptions of employee behaviours (n=4)



Appendix 4: Webinar poll questions

'BE BOLD' WEBINAR 1

23/01/2019

No. PiPS attendees = 70

<p>Poll 1: Which 'Unlocking Potential' resources have you been using so far? (Tick all that apply)</p> <ol style="list-style-type: none"> 1. I participated in webinar 1, 'Enabling Others' 2. I've read the 3 emailed briefings issued so far 3. I've gone through some or all of the resources on the 'Unlocking Potential' page 4. I've contributed to the 'Unlocking Potential' forum 5. I haven't used any resources other than joining today's webinar 6. Other (please tell us in the chat box)
<p>Poll 2: What have you and your employees been talking about in relation to 'Be Bold'? (Tick all that apply)</p> <ol style="list-style-type: none"> 1. Career stories – how did they get here, motivations, strengths and interests 2. Future-proofing – what's on the horizon (for the firm/industry/profession) 3. Planning – how to make progress with their professional development 4. Building a network – with the firm, with clients, within the profession.... 5. Feedback – existing capabilities and reputation – what they could do more/less of? 6. Challenge – looking for some stretch 7. Decisions – how to choose between different options going forward 8. Haven't had any conversations prompted by 'Be Bold' 9. Other (please tell us in the chat box)
<p>Poll 3: What has stopped you having conversations with your employees related to 'Be Bold'? (Tick one)</p> <ol style="list-style-type: none"> 1. Lack of time on my side 2. Employee(s) too busy 3. Reluctance on my part (e.g. don't see the benefit; not part of my day job) 4. Employee hasn't approached me 5. My concerns about raising expectations 6. Conversations are planned, just not happened yet 7. Not sure what I'm supposed to be talking about in the conversation 8. Other (please tell us in the chat box)
<p>Poll 4: What's been an important development experience for you? (Please tick all that apply)</p> <ol style="list-style-type: none"> 1. A new project through which I developed skills 2. Being delegated extra responsibilities 3. My manager encouraging me out of my comfort zone (e.g. making a presentation/taking on different role) 4. Joining a cross-firm venture that widened my network 5. Volunteering to support others based on my knowledge/expertise (e.g. mentoring) 6. Engaging with external organisations and raising my profile 7. Undertaking personal/professional research to gain deeper sector insights 8. Participating in senior leadership or client meetings to understand trends/issues

8. Other (please tell us in the chat box)

Poll 5: What changes have you seen in your employee(s) since they started on 'Be Bold'? (Please tick all that apply)

1. More willing to take on new projects and responsibilities
2. More obvious engagement at work
3. Some impact on day-to-day performance
4. More willing to voice their ideas and opinions about work matters
5. More confidence to talk to you about how to develop their skills or current role
6. More likely to come forward with ideas for how to progress in their current job/role
7. Have committed to some professional development
8. Too early to judge, but signs are looking good
9. No impact so far
10. Other (please tell us in the chat box)

Poll 6: How did you find the webinar? (Please tick up to 2)

1. It was a good investment of my time; useful & relevant
2. It was interesting, engaging and paced appropriately
3. I feel equipped to apply what I have learnt
4. It was reasonably useful
5. It wasn't as useful as I had hoped it would be
6. I didn't get much out of it

'BE BOLD' WEBINAR 2

14/02/2019

No. PiPS attendees = 30

Poll 1: Please choose the statement that best describes your current situation (Choose only one)

1. Early in my career, getting established
2. Experienced and looking for career direction or challenge
3. Managing the balance between work and personal life
4. Responding to significant organisational changes
5. Looking for a new role or changing career
6. Returning to my career after a break
7. Helping others with their careers
8. Other (please explain in the chat box)

Poll 2: Which career habit do you invest least time in? (Choose only one)

1. Stretch yourself
2. Know yourself
3. Adapt to change
4. Spot the opportunities
5. Build your network
6. Build your brand
7. Reflect and plan

<p>Poll 3: To what extent is 'Career Brand' relevant to your situation? (Choose only one)</p> <ol style="list-style-type: none"> 1. I'm already doing it 2. It's one of my priorities 3. It's important but not urgent 4. I'm undecided about whether it matters or not 5. I don't feel it's relevant to me right now 6. It's not something I'm going to focus on 7. I don't really like the idea at all 8. Other (please explain in the chat box)
<p>Poll 4: How motivated do you feel in your work since starting the 'Be Bold'? (choose up to 3)</p> <ol style="list-style-type: none"> 1. I feel more motivated to do my job really well 2. It has impacted on my motivation to do my job well to a certain extent 3. It hasn't made any difference to my motivation to do my job well 4. It has prompted me to take action about my career and development- I feel empowered to do so 5. I'm feeling somewhat tentative about taking action about my career and development 6. I haven't taken any actions yet about my career and development 7. The course has made me more inclined to develop my career with my current organisation 8. The course is prompting me consider options outside of my current organisation 9. The course so far hasn't had a big impact on my actions or how I'm feeling about my work and career
<p>Poll 5: How did you find the introductory webinar? (Please choose up to two)</p> <ol style="list-style-type: none"> 1. It was a good investment of my time; useful & relevant 2. It was interesting, engaging and paced appropriately 3. I feel equipped to apply what I have learnt 4. It was reasonably useful 5. It wasn't as useful as I had hoped it would be 6. I didn't get much out of it

'BE BOLD' WEBINAR

3 06/03/2019

No. PiPS participants = 25

<p>Poll 2: What does 'a great career' mean to you? (choose up to 3)</p> <ol style="list-style-type: none"> 1. Material reward 2. Job satisfaction 3. Community of like-minded colleagues 4. Power and influence 5. Work-life balance 6. Being part of a well-regarded organisation 7. Flexibility 8. Sense of worth 9. Expertise 10. Variety 11. Ongoing opportunity/challenge 12. Stable employment
<p>Poll 3: Who are you having your best career conversations with at-the-moment? (choose 1)</p> <ol style="list-style-type: none"> 1. Manager 2. Mentor 3. HR 4. Internal colleagues 5. Family 6. Friend(s) 7. External professionals in same field 8. Career coach 9. Business adviser 10. Linked In contact 11. Other 12. I'm not having career conversations at-the-moment
<p>Poll 5: Feedback: How did you find the webinar?</p> <ol style="list-style-type: none"> 1. It was a good investment of my time; useful & relevant 2. It was interesting, engaging and paced appropriately 3. I feel equipped to apply what I have learnt 4. It was reasonably useful 5. It wasn't as useful as I had hoped it would be 6. I didn't get much out of it

‘UNLOCKING POTENTIAL’ WEBINAR 1

21/01/2019

No. PiPS participants = 32

Poll 2: What do you want your working life to give you? (Choose up to 3)
<ol style="list-style-type: none">1. Material reward2. Job satisfaction3. Freedom4. Community of like-minded colleagues5. Power and influence6. Work-life balance7. Being part of a well-regarded organisation8. Flexibility9. Sense of worth10. Expertise11. Variety12. Ongoing opportunity/challenge13. Stable employment14. Other (tell us in the chat box)
Poll 3: What are the characteristics of an inspiring conversation? (Choose up to 3)
<ol style="list-style-type: none">1. Trust2. Honesty3. Future-focused4. Follows individual's agenda5. Sufficient time6. Full attention7. Conducive physical environment8. Open-mindedness9. Balanced discussion10. Open questions11. Active listening12. Accurate summarising13. Follow-up14. Keep promises15. Other (tell us in the chat box)
Poll 4: How did you find the webinar? (Choose up to three)
<ol style="list-style-type: none">1. It was a good investment of my time; useful & relevant2. It was interesting ; engaging and paced appropriately3. I feel equipped to apply what I have learnt4. It was reasonably useful5. It wasn't as useful as I had hoped it would be6. I didn't get much out of it

'UNLOCKING POTENTIAL' WEBINAR 2

27/02/2019

No. PiPS participants = 9

<p>Poll 1: Which 'Unlocking Potential' resources have you been using so far? (Tick all that apply)</p> <ol style="list-style-type: none"> 1. I participated in webinar 1, 'Enabling Others' 2. I've read the 3 emailed briefings issued so far 3. I've gone through some or all of the resources on the 'Unlocking Potential' page 4. I've contributed to the 'Unlocking Potential' forum 5. I haven't used any resources other than joining today's webinar 6. Other (please tell us in the chat box)
<p>Poll 2: What have you and your employees been talking about in relation to 'Be Bold'? (Tick all that apply)</p> <ol style="list-style-type: none"> 1. Career stories – how did they get here, motivations, strengths and interests 2. Future-proofing – what's on the horizon (for the firm/industry/profession) 3. Planning – how to make progress with their professional development 4. Building a network – with the firm, with clients, within the profession.... 5. Feedback – existing capabilities and reputation – what they could do more/less of? 6. Challenge – looking for some stretch 7. Decisions – how to choose between different options going forward 8. Haven't had any conversations prompted by 'Be Bold' 9. Other (please tell us in the chat box)
<p>Poll 3: What has stopped you having conversations with your employees related to 'Be Bold'? (Tick one)</p> <ol style="list-style-type: none"> 1. Lack of time on my side 2. Employee(s) too busy 3. Reluctance on my part (e.g. don't see the benefit; not part of my day job) 4. Employee hasn't approached me 5. My concerns about raising expectations 6. Conversations are planned, just not happened yet 7. Not sure what I'm supposed to be talking about in the conversation 8. Other (please tell us in the chat box)
<p>Poll 4: What's been an important development experience for you? (Please tick all that apply)</p> <ol style="list-style-type: none"> 1. A new project through which I developed skills 2. Being delegated extra responsibilities 3. My manager encouraging me out of my comfort zone (e.g. making a presentation/taking on different role) 4. Joining a cross-firm venture that widened my network 5. Volunteering to support others based on my knowledge/expertise (e.g. mentoring) 6. Engaging with external organisations and raising my profile 7. Undertaking personal/professional research to gain deeper sector insights 8. Participating in senior leadership or client meetings to understand trends/issues 9. Other (please tell us in the chat box)
<p>Poll 5: What changes have you seen in your employee(s) since they started on 'Be Bold'?</p>

(Please tick all that apply)
<ol style="list-style-type: none">1. More willing to take on new projects and responsibilities2. More obvious engagement at work3. Some impact on day-to-day performance4. More willing to voice their ideas and opinions about work matters5. More confidence to talk to you about how to develop their skills or current role6. More likely to come forward with ideas for how to progress in their current job/role7. Have committed to some professional development8. Too early to judge, but signs are looking good9. No impact so far10. Other (please tell us in the chat box)
Poll 6: How did you find the webinar? (Please tick up to 2)
<ol style="list-style-type: none">1. It was a good investment of my time; useful & relevant2. It was interesting, engaging and paced appropriately3. I feel equipped to apply what I have learnt4. It was reasonably useful5. It wasn't as useful as I had hoped it would be6. I didn't get much out of it

Appendix 5: Stakeholder focus group report form

3/18/2019

Untitled

Untitled

Current run (last updated Mar 18, 2019 12:18pm)

6

Polls

8

Participants

18

Average responses



Average engagement

When you think of 'productivity' what comes to mind?



Responses

- engaged? connect to commitment - we know more engaged and happy staff will be more productive.
- efficiency with a purpose
- working better?? systems etc that enable rather than act as a barrier. Also staff that are fully engaged
- Going above and beyond
- Working better for benefit of customers and workers and other stakeholders
- GVA per worker/hour worked
- Definitions can be confusing - outputs greater than inputs
- output rather than input
- Working more efficiently, smarter working, good management, making best use of time.
- Motivated, efficient and engaged
- Doing more with less
- Efficiency, good decision making, speed, Engagement
- It is keeping me busy



Engagement

14

Responses

Think of words other than 'productivity' that capture what is important for small and medium businesses? What is different for or specific to professional service firms?



Responses

- innovation
- networks and referral systems
- highly-skilled
- independence
- leadership
- freedom
- growth
- skills
- family
- Efficient
- total output produced per input within an economy
- innovative
- workload balance
- Staff retention
- achievement
- stability
- credibility
- clients matter
- efficiency
- Profit, survival, more customers
- reputation
- profits
- Trained and qualified staff who can give excellent customer service;
- billing
- Engagement



Engagement

25

Responses

3/18/2019

Untitled

What are the barriers to businesses fulfilling their potential? How can these barriers be reduced?

“Uncertainty in economy”

“Time constraints”

“Lack of awareness of relative performance”

“Lack of benchmarking against equivalent businesses”

“Managers are trained Solicitors not always trained to be managers, some are better than others in engaging with their teams or are able to have honest conversations with their staff. They are also expected to meet fee targets so time constraints to manage is an issue. IT solutions and costs in implementing these. Sometimes it may feel that we are competing with ourselves as opposed to external competitors (communication).”

“Barrier - unhappy staff”

Responses

- distraction of "bullshit" work! (ref Graeber) ..wrong tech Fear of choosing
- Lagging investment in technology Speed of change
- People accepting the notion that they are 'self-made'
- Lots of people selling solutions but what will work for them and who to trust
- Evidence of what can and will work
- Not having the time to focus on improving the business, or not recognising the value of doing so
- failure to invest in training and development of staff skills shortages
- Dispositions and 'mind-sets' of business owners
- If SME's identify that they need support, not knowing where to go, or to to trust for advice
- sunk cost fallacy Resistance to change from management and staff
- Incentives - will people benefit from their efforts
- Difference in ambition between owner and employees or amongst owners
- Barrier - unhappy staff
- Managers are trained Solicitors not always trained to be managers, some are better than others in engaging with their teams or are able to have honest conversations with their staff. They are also expected to meet fee targets so time constraints to manage is an issue. IT solutions and costs in implementing these. Sometimes it may feel that we are competing with ourselves as opposed to external competitors (communication).
- lack of benchmarking against equivalent businesses
- Short term competitive pressures Lack of awareness of relative performance
- time constraints Uncertainty in economy



What can businesses do for themselves and what input is helpful from outside the business?

“Speak to peers, or networks of similar business to share best practice”

Innovation should be shaped from evidence/information from outside the business”

“Reviewing management systems”

“Being aware of limitations of expertise and sourcing support”

“Look to expand networks beyond usual suspects... new ideas and viewpoints”

“Be aware of issues that staff may want to reflect upon that affect their performance that they don't want to share with their line manager”

“Mentoring was mentioned in the previous discussion..”

“Ensure Managers are trained and engaged to ensure an engaged workforce. Encourage staff to network by giving them the time to do this. Benchmark salaries and look at intrinsic and extrinsic rewards to acknowledge performance and assist with staff retention.”

Responses

- Addressing tension between individual and organisational productivity. Risk that PDRs only focus on organisational priorities and can be a box which trap high-performing staff in roles that they are performing very well in. Addressing individual issues can also be good for the organisation in unexpected ways.
- Ensure mission and vision statements are up to date and staff know what our purpose is.
- “Themselves” - just the owners/directors? or also their employees, customers, suppliers etc
- foster strong internal team ethos
- Ensure Managers are trained and engaged to ensure an engaged workforce. Encourage staff to network by giving them the time to do this. Benchmark salaries and look at intrinsic and extrinsic rewards to acknowledge performance and assist with staff retention.
- Mentoring was mentioned in the previous discussion..
- Be aware of issues that staff may want to reflect upon that affect their performance that they don't want to share with their line manager
- Look to expand networks beyond usual suspects... new ideas and viewpoints
- Being aware of limitations of expertise and sourcing support
- Reviewing management systems
- Innovation should be shaped from evidence/information from outside the business
- Speak to peers, or networks of similar business to share best practice



3/18/2019

Untitled

Thinking about the different ways individual staff contribute to an organisation, how can you recognise and evaluate non-chargeable activity?

Consider creative ways to include non-chargeable activity in annual appraisals etc.
 Staff engagement and retention
 Importance of reputation and therefore how this is supported by non-chargeable activity
 Performance management and feedback. Giving employees the time and space to share their contributions, and giving managers the space to recognise and value employees
 How often they review internal process, consider and introduce innovations to improve them
 Reviewing the values of organisation so that wider activity is foregrounded in annual planning
 Organise their own decisions to improve their effectiveness - how many staff have the capability, capacity, autonomy and tools to do their job more effectively
 Open competitions for new ideas with funding to develop a business case for introduction

Responses

- Meaningful reward systems that aren't just about getting people to compete with one another.
- Not purely sales based incentive and reward structures
- Sometimes non-chargeable activity is part of a slower burn that can lead to conventional productivity later.
- Culture and Values are important in terms of workplace behaviour... workplace attitudes can easily be identified on whether an individual feels valued or not. Recognition is important. My company has just given Managers some free reign based on a reward budget for their staff, though saying 'thank you goes a long way, we are working in a multi-generational workforce so we need to learn what one generation may like as a reward against another generation.
- Open competitions for new ideas with funding to develop a business case for introduction
- Empower them to make decisions to improve their effectiveness - how many staff have the capability, capacity, autonomy and tools to do their job more effectively
- Reviewing the values of organisation so that wider activity is foregrounded in annual planning
- How often they review internal process, consider and introduce innovations to improve them
- Performance management and feedback. Giving employees the time and space to share their contributions, and giving managers the space to recognise and value employees
- Importance of reputation and therefore how this is supported by non-chargeable activity
- Staff engagement and retention
- Consider creative ways to include non-chargeable activity in annual appraisals etc.



Thinking beyond the job and salary, what does an organisation contribute to the individuals who work with/for it?

Sense of belonging
 Sense of purpose
 Opportunities to develop/train to further careers
 Social/team environment
 Sense of identity, Work identity is still very important to many people. How this contributes to who they are above and beyond when they are at work
 Making that having good quality work is a positive contributor to wellbeing
 A key factor in determining their happiness and well being

Responses

- Is the organisational career dead? How can businesses recognise this without compromising the loyalty that they need from staff.
- Environment lead by example and ensure the culture ensures a happy workforce
- making work a nice place to be and somewhere they want to be - being flexible is good but people do like being together too!
- Ability to influence and affect others, for better or worse
- Social, inter generational socialising as equals, giving new experiences and opportunities, getting new ideas from them and getting feedback from training and opportunities which they have experienced- often managers don't know what to do with this so everyone can be frustrated!
- Many people spend more time with colleagues than friends and family - relationships are very important.
- The ability to live the life they want (or not) Funding social activities
- Social (eg networks) and human capital (eg skills)
- fund staff to achieve formal qualifications, development opportunities, to feel valued and know individual and organisational purpose. Individuals like to feel they are a person not a number so it is important for managers to know and take an interest in their staff and wellbeing.
- A key factor in determining their happiness and well being
- We know that having good quality work is a positive contributor to wellbeing.
- Feeling supported, yet empowered to do the job
- Sense of identity. Work identity is still very important to many people. How this contributes to who they are above and beyond when they are at work.
- social/team environment Opportunities to develop/train to further careers
- sense of purpose sense of belonging

