EAPRIL 2015
Proceedings
EAPRIL 2015
Proceedings

November 24-27, 2015
Belval, Luxembourg
EAPRIL 2015

LOCAL ORGANISING COMMITTEE 2015

CONFERENCE CHAIR
Charles Max – University of Luxembourg

MEMBERS
Christine Schiltz – University of Luxembourg
Bob Reuter – University of Luxembourg
Ineke Pit-ten-Cate – University of Luxembourg
Jean-Marie Weber – University of Luxembourg
Christina Siry – University of Luxembourg
Stéphanie Annet – University of Luxembourg

SUPPORT
Students University of Luxembourg

CONFERENCE & PROGRAMMING COMMITTEE 2013-2015

Frank de Jong – Chair of EAPRIL, the Netherlands
Patrick Belpaire, Belgium
Arnoud Evers, the Netherlands
Jörg Holle, Germany
Anje Ros, the Netherlands
Ruben Vanderlinde, Belgium
Sirpa Laitinen-Väänänen, Finland
Inneke Berghmans, Belgium – Project Manager EAPRIL
Tonia Davison, Belgium (EAPRIL Office)
Liesbeth Braem, Belgium (EAPRIL Office)
Margaux De Vos, Belgium (EAPRIL Office)
EAPRIL is ...

EAPRIL is the European Association for Practitioner Research on Improving Learning. The association promotes practice-based and practitioner research on learning issues in the context of formal, informal, nonformal, lifelong learning and professional development with the aim to professionally develop and train educators and, as a result, to enhance practice. Its focus entails learning of individuals (from kindergarten over students in higher education to workers at the workplace), teams, organisations and networks.

More specifically

• Promotion and development of learning and instruction practice within Europe, by means of practice-based research.
• To promote the development and distribution of knowledge and methods for practice-based research and the distribution of research results on learning and instruction in specific contexts.
• To promote the exchange of information on learning and instruction practice, obtained by means of practice-based research, among the members of the association and among other associations, by means of an international network for exchange of knowledge and experience in relation to learning and instruction practice.
• To establish an international network and communication forum for practitioners working in the field of learning and instruction in education and corporate contexts and develop knowledge on this issue by means of practically-oriented research methods.
• To encourage collaboration and exchange of expertise between educational practitioners, trainers, policy makers and academic researchers with the intent to support and improve the practice of learning and instruction in education and professional contexts.
• By the aforementioned goals the professional development and training of practitioners, trainers, educational policy makers, developers, educational researchers and all involved in education and learning in its broad context are stimulated.

Practice based and Practitioner research

Practice-based and practitioner research focuses on research for, with and by professional practice, starting from a need expressed by practice. Academic and practitioner researchers play an equally important role in the process of sharing, constructing and creating knowledge to develop practice and theory. Actors in learning need to be engaged in the multidisciplinary and sometimes trans-disciplinary research process as problem-definers, researchers, data gatherers, interpreters, and implementers.

Practice-based and Practitioner research results in actionable knowledge that leads to evidence-informed practice and knowledge-in-use. Not only the utility of the research for and its impact on practice is a quality standard, but also its contribution to existing theory on what works in practice, its validity and transparency are of utmost importance.

Context

EAPRIL encompasses all contexts where people learn, e.g. schools of various educational levels, general, vocational and professional education; organisations and corporations, and this across fields, such as teacher education, engineering, medicine, nursing, food, agriculture, nature, business, languages, … All levels, i.e. individual, group, organisation and context, are taken into account.
For whom

Practitioner researchers, academic researchers, teachers, teachers educators, professional trainers, educational technologists, curriculum developers, educational policy makers, school leaders, staff developers, learning consultants, people involved in organisational change and innovation, L&D managers, corporate learning directors, academics in the field of professional learning and all who are interested in improving the learning and development of praxis.

How

Via organising the annual EAPRIL conference where people meet, exchange research, ideas, projects, and experiences, learn and co-create, for example via workshops, training, educational activities, interactive sessions, school or company visits, transformational labs, and other opportunities for cooperation and discussion. Via supporting thematic sub communities ‘Clouds’, where people find each other because they share the same thematic curiosity. Cloud coordinators facilitate and stimulate activities at the conference and during the year. Activities such as organizing symposia, writing joined projects, speed dating, inviting keynotes and keeping up interest/expertise list of members are organised for cloud participants in order to promote collaboration among European organisations in the field of education or research, including companies, national and international authorities. Via newsletters, access to the EAPRIL conference presentations and papers on the conference website, conference proceedings, regular updates on cloud meetings and activities throughout the year, access to Frontline Learning Research journal, and a discount for EAPRIL members to the annual conference.

More information on the upcoming 2016 Conference as well as some Afterglow moments of the 2015 Conference can be found on our conference website www.eaprilconference.org
THE STRATEGY MAP AS A TOOL TO INCREASE THE RETURN ON LEARNING INVESTMENTS: LEARNING PRACTITIONERS FIRST IMPRESSIONS AT THE EAPRIL 2015 CONFERENCE

Tom De Schryver*
*Assistant Professor, University Twente, Institute for Innovation and Governance Studies, PO BOX 217, 7500 AE Enschede The Netherlands, t.deschryver@utwente.nl

ABSTRACT

While strategy maps have their roots in strategic management accounting, they have much to offer to learning departments looking for a good return on learning investments. A strategy map is a visual model that shows which investments are most likely to improve the internal operations of a learning department, which in turn satisfies its customers better and secures that the goals of the learning department are being pursued. A strategy map thus leads to better aligned investments decisions. It also makes it easier for constituents to contribute to the goals of the learning department; and it can be used to trigger compliance. In sum, by creating organizational awareness and commitment to spend the right resources (time, money) towards the goals of the learning department, a strategy map shapes the future of a learning department. However the proof of the pudding is in the eating. This paper shows how strategy maps are received by learning practitioners after being exposed to an EAPRIL 2015 workshop. From factual data and opinions collected via voting software during the workshop, I found that learning practitioners easily picked up the essence of strategy maps. They were also able to make a sound personal judgement about the strategy map. Notwithstanding their short exposure, the learning practitioners identified the same strengths and weaknesses one encounters in the academic literature on strategy maps. Hence I propound that strategy maps are of added value to corporate learning environments.
INTRODUCTION

Most methods for evaluation learning investments, like trainings (e.g. Phillips, 1997), evaluate past performance as they focus on monitoring financial returns of learning interventions. Yet, learning departments rarely frame their goals in purely financial terms. In this paper, I propound that strategy maps are more suitable to help learning practitioners to make better investment decisions which enable them to achieve their goals. A strategy map is a visual representation that shows which investments a business or organizational unit has to consider in order to improve its internal operations and processes, which in turn might entice its customers and result in the delivery of the goals of the unit (Kaplan and Norton, 2004).

Several good introductions, general and critical reviews of the strategy map exist (e.g. Kaplan, 2008; Lueg, 2015; Norreklit et al., 2008). Person (2013) is also worthwhile to mention because he shows in practical detail how to make strategy maps and how to integrate them with balanced scorecards by means of standard office software.

In this paper, I focus on the relevance of strategy maps for corporate learning departments. An example of a strategy map is given in Figure 1, which will be explained in more detail in the paper. Strategy maps can be read from the bottom to the top and from the top to the bottom using an “if-then” logic.

**Figure 1:** An example of a strategy map for learning practitioners

**A proactive rationale for strategy maps**

Unlike Figure 1 suggests, the Dutch national team did not become world champion in 2014. Louis van Gaal only came close to it. A strategy map does not tell the truth; instead it tells a story that appeals to the involved constituents. Strategy maps have been traditionally used to steer organizations towards exceptional returns because of its self-fulfilling prophecy effects. A strategy map should be used to
communicate the roadmap of the learning department to its relevant constituents. It should trigger these constituents to think like partners and to have them behave in value creating ways. Therefore, a strong strategy map is convincing and must be evaluated on its power to attract commitment.

If a strategy map can explain to all relevant constituents of a learning department what the department wants to achieve and how it plans to do so, clarity arises. Moreover, once these constituents accept the message in the strategy map, they will start to think about how they can contribute. They will also be willing to put effort in aligning their activities among each other. Hence, once a strategy map has been understood and accepted, it sets in motion a series of initiatives and activities. Therefore, a good strategy map should give learning departments a direction for the future.

Shared knowledge and aligned action are important benefits of strategy maps. These benefits manifest themselves already before investments and initiatives take place. This gives strategy maps a competitive edge over traditional evaluation methods. A strategy map helps to select the right learning investments and to increase the managerial and organizational commitment for these investments. In addition, it creates options for control during the implementation phase of the map. Target setting and precise measuring tools can be used to make sure that stakeholders align their behaviour.

**On the process of making a strategy map**

Learning departments will only reap the benefits of a powerful strategy map after a set of questions has been answered: what does the learning department want to achieve? Who are our primary customers? When are they satisfied?, How can we help them and tie them to the learning department? …. In short, the strategy map forces learning departments to make a business case. Making explicit what the business case is for a learning department can be hard; especially when the goals of the learning department are unclear or if there is insufficient support or awareness for these goals. To help making a strong strategy map for learning departments, this paper presents an interview protocol that helps to build the business case. The interview protocol that I developed for learning practitioners is presented in Table 1.

Table 1

*Interview protocol for a strategy map*

<table>
<thead>
<tr>
<th>GOAL</th>
<th>What does the learning department want to achieve on the long run? (Vision)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINANCIAL</td>
<td>What are the important, immediate, conditions to achieve that goal?</td>
</tr>
<tr>
<td>CUSTOMER is KING (2 questions)</td>
<td>The <strong>Identify</strong> question: Who should make a crucial contribution towards shaping these conditions? (These are your customers. Treat him/them as a king.)</td>
</tr>
<tr>
<td></td>
<td>The <strong>Inspect</strong> question: What is important for the king?</td>
</tr>
<tr>
<td>INTERNAL PROCESSES</td>
<td>The <strong>Deliver</strong> question: How do you make the king commit to the vision of the learning department?</td>
</tr>
<tr>
<td>LEANING AND GROWTH</td>
<td>The <strong>Invest</strong> question: How can the learning department make its internal processes stronger?</td>
</tr>
</tbody>
</table>
Since the answers to these questions are unique for each learning department, they cannot be imposed by neither consultants nor theory. Answers to the questionnaire should arise internally, after group discussions within the learning department for two reasons. Firstly, overlapping viewpoints of stakeholders challenge and review answers more quickly and lead to more thorough representations of the expected learning effects. The strategy map is a great framework to discuss which investments are needed. More than other evaluation tools for learning investments, it opens up the debate to different kinds of human and non-human intelligence and forces learning departments to pinpoint which investments in human and non-human capital are crucial for success (Kaplan & Norton, 2004).

The second reason why learning departments cannot outsource the construction of their strategy map is related to the commitment that is required from the stakeholders for turning their strategy map into action. Commitment to execute plans generally increases if there is some involvement in the planning process by the ones who have to execute it (Merchant & Van der Stede, 2007, p. 337-338). Therefore it is important to make the maps internally and not have them imposed by some external authority.

In sum there are two reasons why strategy maps are not mainstream in corporate learning contexts. Firstly, strategy maps might suffer from liability of newness. Because of the origins in strategic management accounting, learning practitioners might be unaware of the potential of strategy maps. Secondly, the efforts asked from the learning departments to make a powerful business case, may discourage some learning practitioners to consider it. Consequently, there is a need to trigger the awareness and to discuss the relevancy of strategy mapping among learning practitioners.

Formal training about strategy maps and balanced scorecards is known to help to appreciate and make better use of it (e.g. Dilla & Steinbart, 2005, Humphreys & Trotman, 2011). Learning managers and practitioners need to give it a try. As such, with the support of UP learning, an e-learning consulting company, I started organizing workshops in 2014 that help learning practitioners to appreciate and apply the strategy maps into their organization. The workshops were meant to get learning managers familiar with strategy maps in the context of investment decisions in learning management systems. At the EAPRIL 2015 conference this workshop was repeated and the feedback from the workshop participants was recorded. In the remainder of the paper, I briefly outline the EAPRIL workshop and discuss the responses of the workshop participants.

The relevance of this paper is twofold. First, this paper opens the debate about the usefulness of strategy maps in the corporate learning context. As such, I try to promote the use of strategy maps in the corporate learning context. Secondly, it responds to a call in a fairly recent literature review of strategy maps for more research on the usability of the strategy maps among managers and employees who have to execute the strategy every day (Lueg, 2015, p. 39).

**METHODOLOGY**

Together with UP learning consultants, I organized a 90 minutes interactive workshop during the EAPRIL conference. The slides of the interactive workshop are available at De Schryver et al. (2015). The outline is as follows: I first presented the agenda and goals of the workshop and explained how to use the voting software Shakespeak, a PowerPoint plug-in. Afterwards, I explained the notion of strategy maps, its conceptual origins and its relevancy in a corporate learning context. In the interactive part of the workshop, I presented two teaching cases, which were pretested in previous workshops. Each case has its own purpose. Below the differences between the cases and the case descriptions will be made clear. The EAPRIL workshop ended by asking participants to highlight one
strength and weakness of the strategy map. Again these opinions were recorded and published in real-time via Shakespeak. Finally, consent to analyse the results was asked for and given by the audience. Consequently, the results could be downloaded and used for analysis.

First teaching case

The first case considered the strategy of Louis van Gaal as a national football coach for The Netherlands during the 2015 World Cup in Brazil. This case is well suited because Louis van Gaal faced similar challenges as corporate learning departments. He had to optimize the talent management cycle in order to contribute to results that are beyond his span of control. He therefore had to select, onboard, integrate people so that organizational success can be attained.

The aim of the first teaching case was to make the workshop participants acquainted with strategy mapping in a learning by doing mode. They had to gain confidence in the tool. Therefore I started with a case that could appeal to almost anyone without a lot of instruction material. In particular, I used Louis van Gaal as a teaching case because I speculate that most workshop participants are likely to know him, that the goals of Louis van Gaal as a national coach are also clear to everyone and also that the roadmap to realise this is pretty obvious. Louis van Gaal is a strong manager who expects that players and staff conform to his standards. He also realizes that he needs his players to perform and supports them as much as he can (Posthumus, 2014) I believe that it is just a matter of translating this information into a strategy map.

Another measure to increase their confidence further, was to use group pressure during the teaching case. By organising the first case in a plenary session, I hoped to convince the audience that it is possible to construct a strategy map by means of the interview protocol in Table 1. The audience of the workshop were prompted to reconstruct this story with the help of a trimmed version of the interview protocol. Because of time constraints in the workshop, the inspect question in Table 1 was skipped. (This is only recommended when the case is simple and only for didactical purposes.) To make sure that audience would start, I helped them out by presenting the first three questions in a closed-ended format. The remaining questions were open-ended. Responses were transferred via mobile phones or tablets. They were immediately visible to the audience via Shakespeak. After having completed the questionnaire, I compared their answers with a strategy map that was made before the workshop.

The strategy map, presented in Figure 1, shows that van Gaal was successful at the World Cup 2014 by making the right decisions early on. In particular, van Gaal invested in a win culture (i.e. non human capital) by selecting only players and other staff who had demonstrated to be able to make the difference in their area of expertise. In other words, he did not take the reputation of famous players for granted. Star-players, like Wesley Sneijder, were not sure about being selected for the national team. They had to show that they were fit by playing enough matches in their clubs. Van Gaal subsequently did everything in his power to improve the selection of fit players. For example, from newspaper articles we know that, he used video, which gave feedback about the player’s performance and information about the adversaries (Staf Oranje groter dan spelersgroep, 2014). By creating optimal support conditions, both on and off the field, players started to believe they could perform (Posthumus, 2014). They started acting as a solid team. They started making winning goals which were necessary to attain the ambitious goal of van Gaal. Ultimately, he did not make it but the results were satisfying. Since the Dutch team performed beyond expectation by winning the third place play-offs, this case shows the true potential of a strategy map. It creates momentum by commitment, but it is not a guarantee for success.
Second teaching case

The aim of the second teaching case was to make the workshop participants experience that making a strategy map is a non-trivial exercise. I therefore used a client case of UP learning. Participants were asked to make a strategy map for the academy a large insurance company in the Netherlands facing onboarding challenges.

For this teaching case, teaching materials and instructions would be distributed and the audience would be divided into small groups of 5 participants. 30 minutes were given to make a strategy map for the academy of the insurance company. At the end of the second teaching case, groups had to present their visualisation, which would then be compared with a strategy map that was made upfront.

The context of the second teaching case is much more complex than the first, because participants did not have sufficient knowledge about the insurance company, nor its industry, neither its products. Moreover, the overlap between the goals the learning academy and the insurance company are far less obvious. The academy does not want to sell insurance products, it wants to deliver skilled employees.

This high level of complexity is not an ideal setting for making a strong strategy map by laymen under time pressure. It is therefore unrealistic to expect that workshop participants can construct themselves a strong strategy map on such a short timeframe, without any serious stake involved in the insurance company. Yet by presenting the workshop participants a teaching case that is more similar to their working context, we expect to trigger reflections on whether the tool of strategy maps would be of value to their organization as well. Working with a teaching case in a real business context, deepens their notion of the strategy map. After all the proof of the pudding is in the eating. Exposure to an extra case in a small group setting thus serves a better test to evaluate the potential of the strategy map.

RESULTS

Participation to the workshop

14 participants decided to join the EAPRIL workshop on strategy maps. This is a good number to organise a workshop. Yet, this number corresponds to less than 5% of the registered participants to the EAPRIL conference. Participation to one of the 11 EAPRIL workshops/symposia was voluntary. Conference participants made their selection based on abstracts in the conference program. Save for expectations that workshops are interactive; the participants had no extra information about the details of the workshop. It is likely that the 14 participants chose this workshop based on the abstract because it was the workshops organizer’s first encounter with the EAPRIL conference or alike. Even though at hindsight it appeared that most of the EAPRIL participants had an interest in school education and less in workplace education, the low attendance can be seen as an indication that strategy maps is not a hot item among learning practitioners. Clearly, some more communication effort is needed to attract the potential of strategy maps.

Results from the first teaching case

The participants constructed a strategy map for Louis van Gaal based on the interview protocol in Table 1. The answers from the 14 participants are presented in Table 2.
Table 2 shows that most (10) participants recalled that Louis wanted to become world champion - i.e. question 1 in Table 1 - and the majority (9) also realized that winning matches is the condition sine qua non (question 2 in Table 1). The third question tries to identify the prime customer(s) of a learning department. A customer in the strategy framework for learning department corresponds to the stakeholder who is most needed to achieve the result in question 2. The votes to the third question lead to more diverse responses. The modus (6) in this case was the players. It could have been interesting to start a discussion in the group why the Royal Dutch Football Association (KNVB) is not the prime stakeholder. Instead, because of time constraints during the workshop I simply explained that the board members of the KNVB are not in best shape to make winning goals.

We then turned to the “deliver” and “invest” question in Table 1. For these questions, the participants had to phrase their own answer instead of choosing among different answers categories. I first present the answers on the “deliver” question. According to the participants, Louis van Gaal has to be clear, honest, had to motivate, to give/get trust, to work together and, to listen. Hence most participants mentioned the need to address the psychological and social dynamics in the team. This makes sense for players that are already talented and fit. Team success depends on other aspects like mutual trust and clear communication. More importantly for the sake of strategy map construction, these answers of the workshop participants rightfully point out to operations that help to tie players to the team, which in this case overlaps with the learning department of the football association.
Table 2

Workshop answers to the interview protocol

<table>
<thead>
<tr>
<th>Question</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What did Louis van Gaal want to achieve as a national coach of the football team? (the objective)</td>
<td></td>
</tr>
<tr>
<td>- to qualify for the World Champions</td>
<td>1</td>
</tr>
<tr>
<td>- to survive the group stage</td>
<td>1</td>
</tr>
<tr>
<td>- the quarter finals</td>
<td>0</td>
</tr>
<tr>
<td>- the semi finals</td>
<td>1</td>
</tr>
<tr>
<td>- the final</td>
<td>1</td>
</tr>
<tr>
<td>- world champion</td>
<td>10</td>
</tr>
<tr>
<td>2. What is the most important condition to achieve that objective?</td>
<td></td>
</tr>
<tr>
<td>- to attract talented players</td>
<td>0</td>
</tr>
<tr>
<td>- to have a good team</td>
<td>4</td>
</tr>
<tr>
<td>- to score goals</td>
<td>1</td>
</tr>
<tr>
<td>- to win matches</td>
<td>9</td>
</tr>
<tr>
<td>- other</td>
<td>0</td>
</tr>
<tr>
<td>3. Who is Louis van Gaal’s customer?</td>
<td></td>
</tr>
<tr>
<td>- the fans</td>
<td>3</td>
</tr>
<tr>
<td>- the media</td>
<td>0</td>
</tr>
<tr>
<td>- the Royal Dutch Football Association (KNVB)</td>
<td>2</td>
</tr>
<tr>
<td>- the players</td>
<td>6</td>
</tr>
<tr>
<td>- Other</td>
<td>0</td>
</tr>
<tr>
<td>4. What does Louis need to do to make the players listen to him?</td>
<td></td>
</tr>
<tr>
<td>'Give trust', 'Authority', 'Earn their trust', 'Pay much money.', 'Collaboration', 'Gain respect', 'play together', 'motivate positively', 'Listen to them/their ideas', 'Motivate', 'Clear. Honest. 'Have a clear strategy and make sure everyone understands it and can relate their own function and goal to it', 'Respect', 'To give a perspective and trust how to win'</td>
<td></td>
</tr>
<tr>
<td>5. What to do when you lack certain competences?</td>
<td></td>
</tr>
<tr>
<td>'Find another person', 'Reflective coaching and give support', 'Replace', 'Find people who have them and work together with them', 'Find it elsewhere', 'different strategy', 'Create learning opportunities', 'train on the lacking competences', 'Replace', 'Job rotation', 'Extra training', 'Change strategy', 'Hustle the team', 'Bribe referee'</td>
<td></td>
</tr>
</tbody>
</table>

Legend: bold answer corresponds to the “correct” answer option in Shakespeak. Order of answers to open questions is chronological order of recording by Shakespeak.

Finally, I asked the participants what to do if some competencies are missing; and showed a player of an injured pivotal player (a picture of player Kevin Strootman was displayed, see De Schryver et al., 2015). As a result, most of the answers of the participants focused mainly on strategies to invest in new players (4) or to train the existing team to accommodate to the new situation (5).

The “invest”-question in Table 1 ought to trigger answers that make clear how the learning department can invest in its operations so that it better supports the existing players. The confusion about the invest question is a limitation of the simplified teaching case. This feedback was also given to the audience just before the second teaching case. At the end of the first teaching case, I showed that stacking the most common answers leads to a strategy map, similar to Figure 1. Hence in less than 20 minutes, workshop participants were introduced to strategy mapping for learning departments.
Table 3
Workshop participants evaluation of strategy maps

1. What is the prime strength of strategy mapping for evaluating learning investments?

'Shared language', 'Common ground', 'Tool for discussion & clarity', 'Alignment of strategy and L&D', 'overview of different processes and relations', 'Shared understanding through the process', 'it gives you a good overview that helps you to plan', 'Overview', 'L&D department helps in achieving company strategy', 'Create a business case', 'To make visible the correlation of cause and effect.'

2. What is the main weakness of strategy mapping for evaluating learning investments?

'Too linear', 'Top down', 'Who are the right people to start this process', 'simplifying', 'misleading terminology (customers, financial)', 'Not easy to construct and to communicate.', 'Process needs to be understood clearly', 'differences between corporate map and map for the academy', 'You cannot be sure that the L&D activity is responsible for reaching the goal', 'Finance - outcome', 'If you're not specific enough, there's a risk of staying to vague', 'Linear, simply.', 'Takes a lot of time I presume...?'

Legend: Order of answers to open questions is chronological order of recording by Shakespeak.

Results from the second teaching case

In this teaching case, groups of five were asked to construct a strategy map for the academy of an insurance company. Because there were 14 participants, the audience was divided into three groups. All groups managed to present a concept strategy map on time. Pictures were taken from them. There was a short debriefing which consisted of comparing their maps with a strategy map I made beforehand for the academy of the insurance company. (The strategy maps of the three groups and mine are available from the author upon request.) Then the workshop participants were asked to identify the main strength and weakness of strategy maps for learning practitioners. Their answers are presented in Table 3.

Eleven out of fourteen participants were able to identify a clear strength of strategy mapping by means of the voting software. As the first row in Table 3 indicates, most participants acknowledged that strategy maps help increasing the organizational awareness/ clarity/ alignment. Indeed in the literature, strategy maps are seen as a useful communication tool (e.g. Lueg, 2015). The workshop participants equally acknowledge that strategy maps have value to learning professionals.

Thirteen participants identified a major drawback or concern of strategy mapping. Three kinds of drawbacks were identified. A first group of responses pointed out that the terminology was confusing, like the use of words ‘customer’ and ‘financial’. This confusion relates to the conceptual roots of strategy maps. I think that more clarification or even translation of the terminology can lower the degree of noise.

A second kind of drawback related to the difficulty of constructing a strategy map. Indeed it is important to spend sufficient time on it and to identify the right group of people to construct it. People involved in the construction phase should all have a stake in the learning department. Multiple rounds are needed to revise answers and to make the answers compatible to each other. Revisions are needed to fine-tune the strategy map. This drawback hence reflects as much as a limitation of the workshop format as it is a weakness of strategy mapping.
The final set of drawbacks raises important ontological questions: are strategy maps not too simple, too linear or too top-down? Some scholars have raised similar concerns (e.g. Norreklit et al., 2008). The value of strategy maps depends on how it is being used. If it is misused as a toy for senior learning managers, then it is too simple and top down. In the latter case, it is misuse because strategy maps should be evaluated on its power to engage others to take ownership. Hence strong strategy maps do not only have top-down effects but should also trigger bottom-up initiatives.

DISCUSSION

In reaction to the latter drawback mentioned by the workshop participants, I would like to emphasize that strong strategy maps are not linear per se, they only point out towards a desired direction. An active attitude of all relevant stakeholders of the learning department is required to take that turn. If one combines the visionary element of strategy maps with its power to appeal, it become clear that strategy mapping requires a self-directed learning environment. Self-regulated learners need to control their learning (thoughts and actions) in order to meet learning goals. Control is only useful when self-directed learners monitor the effects of their thoughts and actions and be willing to adjust their actions; or the strategy map.

The latter should be considered periodically because a strategy map is constructed in time. It is only a snapshot. When it is constructed, the strategy tells a story. It gives a roadmap for the future. It is up to the reader to judge and to believe the story. When strategy maps are operational, they help to interpret reality. New initiatives will eventually lead to new insights and ought to trigger learning departments to reflect on their strategy map. The assumptions within a strategy map will be different from reality. Therefore, as new information unfolds, learning departments should remain open to it. Especially information that is at odds with the strategy map is interesting because differences between reality and plan, can trigger single and double loop learning effects. Single loop learning leads to actions to realign. Double loop learning leads to modifications in the strategy map of a learning department. A very good illustration of the non-linear, positive and disruptive and unforeseen effects of management control systems that were initiated from the top can be found in Revelino & Mouritsen (2015). The issue is to determine when to stick to the strategy map or when to change it. When one changes a strategy map, its linear and top-down features disappear.

CONCLUSION

In this paper I presented and reflected upon the first impressions of learning practitioners to strategy map after being exposed to a workshop. On paper, strategy maps are believed to help corporate learning managers making better investment decisions. The benefits of strategy mapping seem to be easily understood by the workshop participants. They voice benefits similar to the ones encountered in the scholarly literature. The workshop also highlighted some hurdles in the use of strategy mapping. More efforts need to be done to avoid confusion due to ambiguous vocabulary and accounting jargon. These translation issues can also be solved by providing training and workshops. Training efforts are mostly needed to counter some of the ontological misinterpretations that could arise when using strategy maps. They should not be used neither seen as a bureaucratic, diagnostic tool, but as an interactive control tool. The paper also corresponds to Lueg’s (2015, p. 39) call for reflections by middle managers or employees who execute the strategy every day. It cannot be introduced without proper guidance.
Of course this paper suffers from limitations. The exposure to strategy maps was severely limited in time. Workshop participants were only exposed to a crash course on strategy maps. More time needs to be spend on this topic by learning practitioners. Therefore the feedback gathered from the workshop is only a beginning of the evidence that strategy maps have relevancy in a corporate learning context. Only when strategy maps are effectively being used to select and implement learning investments, can we fully assess its potential. This paper, with the interview protocol, the teaching case material, nudges learning managers to take a start with strategy maps.

ACKNOWLEDGEMENTS

This research was financially supported by UP learning. I especially thank Paul van den Hurk and Alfred Venema from UP learning who greatly assisted the research and the workshops.

REFERENCES


