Career as an Experiential Learning Voyage

Development of Experiential Assessment Methodology in a Lifelong Learning Context
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ABSTRACT

This research is in the management discipline, more specifically in human resource management concerned with staffing. It examines a relatively new phenomenon: career changes by a special cadre of individuals who have advanced education and training, perhaps a doctoral degree in sciences, humanities, or engineering, and who, at the dusk of their careers, became entrepreneurial and strive to switch from an executive position in business to an academic post or vice versa. In the light of recent societal and environmental developments, and the fact that people more often change careers, there is a growing need for systematic assessment processes. For people who want to change careers at an older age, there are no assessment models available and consulting agencies have not specialized in these areas.

By using the assessment methodology developed in this research, it is possible to assess a person’s lifelong careers and to use these assessments in recruitment situations. The models explain how to select shortlisted candidates. The models are based on learning theory, especially experiential learning theory which is particularly important for candidates with lifelong careers and older exam certificates. The models give special attention to the learning that has taken place in practice for people aspiring to change careers. The respondents of the empirical study were of this type. Ten people with lifelong careers were interviewed through a narrative method but guided through a learning model of content, incentive, and interaction. Their cases have been related to experiential learning theory to give a foundation for developing an assessment methodology of lifelong careers. The concepts of competence and employability are central, as assessment has to be towards an object and purpose: a candidate for a job in a recruitment situation.

The special characteristic of this study is that it deals with people who show entrepreneurial behavior by shifting to business after a long career in academia, or vice versa. For them a lifewide career can be described by the occupation they have had in the two professions, academia and business. Lifelong careers give candidates possibilities to see their lives’ courses in retrospect and to assess their careers. Based on recruitment criteria set up by the employer, candidates have the opportunity to deliver information and evidence for employability through describing their competences to assessors. Special weight should be put on describing the life courses through eras of their professional lives.
and what has motivated them in specific eras – and especially what has motivated them to change careers.

The portfolio is a tool suitable for lifelong career reporting – especially on the candidate side as this gives him a “database” from which he can tailor job applications and address employer requirements. On the employer side, there is a need for assessment methods to select the best candidates. With the assessment methodology developed in this research, employers have models and tools for more objective recruitment of candidates. This research provides concrete methods for assessing candidates and models for quantitatively prioritizing shortlisted candidates. The aim of the study is to make assessment methodology and tools for recruiting purposes, especially for entrepreneurial people with a lifelong career.

Key words: Experiential learning, competence, recruitment, assessment methodology, lifelong learning, lifewide learning
To my great inspirator and mentor Professor George Tesar

To my parents, my brother Niels (1937-1998), my sister Else, my wife Svetlana, and my sons Jakob and Simon.
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CHAPTER 1
INTRODUCTION

The research deals with assessing learning of individuals with lifelong careers. Increasingly, individuals want to shift jobs at a mature age. How can their experiences be assessed for job shift purposes? The chapter goes behind the trends of job shifts for mature people and it also pays attention to the increased interest in learning from experience. It points out the need for recruiting people from a broader base than has been previously seen.
This research focuses on assessment in the area of business management and experiential learning assessment. Experiential learning assessment comes to management from two sources: (1) human resource management, which is sometimes an integral part of general management, and (2) education and more specifically lifelong learning experiences. In human resource management, experiential learning assessment is used to evaluate personal achievements and professional experiences combined with profession outcomes of managers before they are promoted to positions of higher responsibility. In education experiential learning assessment is used in the process of determining an individual’s educational qualifications for further, more advanced education. An individual’s educational qualifications can be based on personal job experiences interpreted in an educational context. In both applications, experiential learning assessment implies its own assessment (research) methodology (Brinke et al., 2008; Edwards, 2005).

This study examines experiential learning in the context of academic entrepreneurship: The main focus is on assessing experiential learning for individuals with lifelong careers. The research is based on interviews with people with degrees from universities who have shown interest, drive, and entrepreneurial behavior in their careers and have moved from academia to business or vice versa. The research will develop methodology for assessing lifelong careers for the benefit of career counselors in situations where mature applicants apply for jobs. They have a problem assessing the experiential part of applicants’ learning – the part not covered by exam papers. This research aims at reducing this gap.

Environmental trends within the business society are clearly shaping the way professionals live and work (Lock & Hogan, 2000). Business careers can now be looked at as learning cycles more than as lifelong career cycles (Alheit, 1999; Baruch & Hall, 2004; Romaniuk & Snart, 2000). People are living longer, working longer and also studying longer. Lifelong learning trends not only are changing the way institutions of learning function, offering programs on campus and via the internet, but also the way they need to evaluate the past performances of their nontraditional students (Alheit, 1999; Colardyn, 2001; Lundgren, 1999). This is particularly the case when professionals want to work towards advanced degrees such as master’s or doctoral degrees. At the same time there are academics who, after many years spent in a classroom in front of students, decide to join the corporate world (Baruch & Hall, 2004). Corporations today are not very well capable of assessing managerial potential of former academics. This may be due to the relatively new phenomenon of late career changes. Consequently, both academic institutions and the corporate world need a systematic and objective process for assessing
professional qualifications of individuals who become entrepreneurial or academic after exploring the other domain.

Although a great deal of research has been done on how entrepreneurial propensities evolve through experiential learning opportunities and through experiential learning itself (Larsen 2004; Pittaway & Cope, 2007; Rae & Carswell, 2000; Seibert, 1999), few, if any, attempts have been made to develop a suitable assessment process that can be systematically and objectively applied to this new social phenomenon of radical career shifts. The development of such an assessment process is the central objective of this research. Academics concerned with human resource management typically focus on two aspects of human resource development—hiring and firing (Ostell, 1996). Hiring under the special conditions of mature academics or senior executives changing careers at later stages of their lives has not received a significant amount of research. One primary issue that faces these institutions of higher learning is the responsibility to develop a suitable methodology to objectively assess experiential learning as a prerequisite or replacement of formal studies in class or on campus. The problem faced by these institutions, particularly business or management schools, is that they need to borrow or transplant assessment methodologies that have been developed and used in other disciplines (Romaniuk & Snart, 2000).

In education we can discuss the quality of what we are doing. Are our students meeting externally established standards? Recently, there has been more focus on quality assessment in educations (Holmlund, 2004), but do employers want to hire our graduates who have hardly any experience? How well do our students do? Many academics are involved in assessing student learning outcomes. Assessment is generally seen as a way to measure whether our students have learned what we have taught them. However, assessment today increasingly deals with the development of thinking, performance skills, and attitudes instead of just measuring knowledge (Knight & Yorke, 2003). “We are observing a paradigm shift away from the concepts of education and training towards the concept of learning” (Alheit, 1999). As a result of the Bologna process, higher education has begun to push new assessment approaches to the fore while emphasizing the skills and dispositions needed for lifelong learning, entrepreneurial thinking, problem solving and reflection over content knowledge, all wrapped in a package of learning outcomes. Curricula should now contain learning objectives and learning outcomes. It is part of the mission of preparing students for a more mobile, active and entrepreneurial life. The employability of our students is stressed as a way to improve the balance between supply
and demand in the labor market. These ideas are in line with the ideas of the European Commission and the entire Lisbon strategy (European Commission, 2001), in which the concept of entrepreneurship has been incorporated in the framework of lifelong learning and has become one of the new ‘basic’ skills that should be introduced in education.

These demands for change indicate that the worlds of education and work are becoming more closely linked, in order to make the education-to-work transfer as easy as possible. One aspect of this is that we can even see an opposite work-to-education transition, i.e. approaches and methods from working life are entering the formal education institutions (Baruch & Hall, 2004). There is a growing appreciation in academia for the experiences and competence that practitioners out in the field have. Another aspect is the growing insight that knowledge comes in different forms, which means that re-evaluation of practical knowledge, real world experience, and competence has gained momentum (Larsen, 2004). The combination of these factors has resulted in the growing interest for the value added of experiential learning and career assessment. Further, it provides opportunities to link together academic (school) learning with real-life experience (Teunissen & Dornan, 2008).

In academia, people are in an environment where cognitive thinking is a principal characteristic. In research, people try to conceptualize and develop theory and to test it. In teaching, people communicate abstract ideas, models, and theory. They are not in the “real world” but they are surrounded by representations of the real world.

In practice, on the other hand, people see machines in operation. They see what they put into the machines and what comes out. They see machines process raw materials into finished components or products. In service industries, people see back office activities processed and at the service counter they experience “the moment of truth” (Norman, 2000). Even in advertising agencies, where it is said that “we know that half of the advertising budget is wasted, but not which half,” they see the results of their work. A media plan is produced, ads are inserted, and clients respond. All these events mean something regarding learning and the quality of learning.

When we communicate in academia, we often use metaphors (Morgan, 1986). We want to link our abstract thinking to something concrete and known so that we understand better. Then we test our theory and often we find that the outcome was not as expected. Something didn’t function. We try to conceptualize again and test again, and maybe
finally we succeed. In practice we often learn by trial and error. A hallmark of practice is doing. If it doesn’t work the first time, you try again, perhaps a little differently, and try to uncover the logic in what you are doing. Dyson tried hundreds of times before his cyclone vacuum cleaner functioned satisfactory (Smith, 2006).

Increasingly, companies recruit employees from a broader base (Carnall, 2003). More open job markets and global companies also mean more diversified human resources are available (Lock & Hogan, 2000). There is a need for revised procedures and new tools for selecting the right people for the right jobs (Fouad & Zao, 2000). In an interview in Dagens Industri (28 April 2008) the human resource director at the Swedish builder giant Skanska, Tor Krusell, says: “What motivates people to apply for a job in a company are good managers and what gets people to quit are bad managers.” Therefore, Skanska has a system for evaluating managers. The system is based on surveys where employees answer questions about their experiences with their managers. New managers are systematically recruited with precise descriptions of benchmarks. At the same time, Skanska looks at itself as a special company with a unique culture: open, uncomplicated, result oriented, and project oriented. Other companies have other cultures and the benchmarks will, therefore, be different.

It is said that exam certificates devalue rapidly in today’s modern world. If that is true, it means that people have to educate themselves continuously just to stay at par (Teunissen & Dornan, 2008). Much of this further education must happen in practice, as people cannot sit in classrooms all their lives. There is a need to assess what people have learned from experience through life.

Another trend is that people change careers more often today. An interesting question to answer is why they change careers. Why do they change from a career in academia to a career in practice or vice versa? What motivates them? The situation can be illustrated as in Figure 1.1.

![Figure 1.1: The importance of incentives over a career](image-url)
As can be seen from Figure 1.1, learning can come from academic positions and practical positions respectively over time. To learn you must have incentives, but it is probably true that the incentives are stronger in periods of transition from academic positions to practice positions or vice versa. This study will draw attention to these processes.

Baruch and Hall (2004) claim that careers in academia and business are getting closer to each other, as universities have become more customer focused and business driven while business organizations have become more flat and boundaryless as people from many functions work together. They argue that businesses have changed more in the direction of academia than the opposite. The psychological contract between employers and employees has changed too. From being relationship focused, assuming a lifelong career in an organization, business has now become more transaction focused, where the continuation of the relationship is based more on what the employer and employee can deliver to each other (Romaniuk & Snart, 2000).

Environmental factors can also change the need for an employee’s service, and he sees the benefits of offering his service to other organizations. Employees have become more like free agents, moving periodically to better jobs for higher salaries, better rewards, or better quality of life. Business careers are today more learning cycles than lifelong career cycles (Hall & Mirvis, 1995). This gives people mobility in their careers, as they can transfer their competences to other jobs, and in some cases act upon their careers (i.e., control, invent for themselves). Their careers become simultaneously continuous and discontinuous (Baruch & Hall, 2004).

As the academic and business sectors tend to converge, more frequent career shifts between the two sectors should be expected. There will be a need to assess the part of learning that has resulted from practice (experiential learning). Experiential learning gives a possibility to benchmark the learners’ theoretical thinking and their conceptual understanding in real-world situations. Experiential learning is taking place in working life, i.e. in academia and for instance trade and industry, which raises several interesting questions for study. For example, how can we value/assess experiential learning in relation to the experiences professionals/entrepreneurs have gained, both from academia and business life, throughout their careers? A person who has made a radical career shift – typically late in his career – is regarded as entrepreneurial in this study. In other words, how can we assess the lifelong experiences of people that have changed careers and shown entrepreneurial behavior?
More specifically, this effort is undertaken to explore how academics or managers who want to change career paths in mid-career can be objectively and quantitatively assessed, and their career experiences systematically evaluated, to determine how qualified they are in extending their professional careers into different professional fields, such as from academia to business or from business to academia. Policymakers have great interest in reliable assessment methods for experiential learning so that mobility in the labor market can be improved and more people can qualify to stay there longer (see for example OECD, 2004).

For people, this will enhance life quality and give renewed motivation for further learning. For society, it will be a gain with a still more educated population. People will be happier, healthier, and better contributors to society. There is also a growing public demand for verifiable proficiency as a basis of trust in many professions (Edwards, 2005).
CHAPTER 2

BACKGROUND

The background for the increasing interest in people who shift careers is discussed. Similarly the increasing interest of people in shifting careers is discussed. New terms such as longevity and lifelong learning have entered the vocabulary. The need for assessing the experiences of these people by institutions and companies is described.
One day I was discussing with a friend my interest in individuals who changed careers. We talked about people we knew in academia, especially in business schools, who spent some time in industry. We also discussed people who were academics and at some point in their academic experience decided to join, for whatever reason, the corporate ranks. My friend remembered an article in one of the leading international professional journals about Harvard Business School’s professor, Raymond Vernon. His story inspired me to examine his career. But more than that, I wondered how to assess the professional career of somebody like Raymond Vernon. This is how I started to think about the assessment of experiences of someone successful who changed careers whose entrepreneurial propensity must have been high. In an article in Journal of International Business Studies, Vernon (1994) wrote about how he “stumbled into the field of international business” and what experience might have taught him. He taught international business from 1959 to 1978.

Vernon’s article brings him through different phases of his business life, and it reflects the times he lived in very well. It describes the evolution in international business education. When he started at Harvard Business School in 1959, there were no packaged curricula or textbooks in the field of international business (Vernon, 1994), so he had to shape the discipline himself. Vernon’s experience had been advertising effect measurement, business cycle measurement, time series analysis, and the behavior of stock markets. Later he participated in a delegation which traveled to Japan charged with formulating policies for the control of Japanese industry. At another job, at the State Department he served a brief apprenticeship on international problems relating to patents, copyrights, trademarks, and cartels. At Forrest Mars, the creator of M&M chocolate, he learned about disciplines that later were ascribed to Japanese production methods: lean production, just-in-time, inventory control, and a zero reject rate. A later job was as special assistant to the Under Secretary of State, charged with work that later led to the Trade Expansion Act of 1962 and the subsequent Kennedy Round.

Vernon then came to Harvard Business School. Here he studied multinational enterprise. He was head of creating a huge data bank of some 400 leading multinationals headquartered in the United States, Europe, and Japan. In the early 1960s, Harvard Business School decided to adopt a formal structure based on functional areas with international business as one of them. International business continued to grow and put pressure on this functional structure. It was decided to dissolve the functional area of international business and spread the people into other disciplines for internationalizing
their curricula. Twenty years later, Harvard found a renewed interest in focusing on International Business as a special discipline – a trend that Vernon welcomed.

This short presentation of Raymond Vernon is only one inspiration to do this research. Vernon’s professional life, in many ways, resembles the lives of many academics and businesspeople. The daily press has an increasing number of stories about mature people shifting careers. In Vernon’s article, he looks across his life as a professional and tries to explain how theoretical learning, personal interests, chance, and professional positions formed his life and gave him his expertise. He entered academic life rather late, as he was appointed professor at Harvard Business School in 1959 at the age of 46. Until then he had held professional jobs in government, business, and nonprofit organizations.

What is the moral of this story? Vernon was quite an entrepreneur trying novel things, both in his corporate life and in his career at Harvard Business School. He is an excellent example of why it is so difficult to assess a long productive career of either an academic or a corporate executive; functioning well in one sector does not automatically promise functioning well in another sector. There must be a better way!

Raymond Vernon’s autobiography represents a new trend in research. A number of scholars, including some of the leading Scandinavian researchers, for instance Björnåvold (2001) and Larsen (2004), suggest that there could be a great deal of rich knowledge gained by examining experiences that one has gained over the span of his or her career, academic or corporate, and retrospectively analyzing these experiences in a context of some convenient theoretical model or framework. This is exactly what I am interested in doing in my own research.

There is a growing interest in biographical and even autobiographical representations of extraordinary people. Their life stories can cast light on their achievements, give them a background, and maybe explain the sources and occasions where they got their learning and achievements. In 2003, the journal Organization Studies started a new section called “Vita Contemplativa.” The editor described the section as a place in which

“Distinguished organizational scholars are invited to reflect on their work and academic lives – namely summarize their work, their contribution, and reflect on how their work was developed over time. The purpose is to introduce some reflexivity into our field by asking leading scholars to describe the intellectual milieu that shaped their thinking, the important
influences in their lives, and the intellectual atmosphere as well as the institutional environment within which their ideas developed. In other words, I am looking for autobiographical essays to show us how ideas develop in our field” (Bartunek, 2007).

Well known scholars such as Argyris (2003), Schein (2006), and Weick (2004) have already contributed to the journal. The lifetime span is indeed interesting when looking into the matter of career change, but we can also ask the questions: “Where do people learn? Does learning only take place in institutionalized forms (schools or universities)?”

In his book, “Making Sense of Lifelong Learning,” author Norman Evans (Evans, 2003) writes about the developments during the past 25 years of assessing informal learning (non-intentional, non-formal learning). He points out that people acquire significant learning through many means: at work, as leisure activities, on travels, by watching TV or listening to radio, doing garden work, and through any other activity in fact. The learning does not have to be intentional, but can be incidental and unconscious.

But how can we assess experiential learning? Learning by experience is a recognized fact. In pre-industrial time it was often the only way to learn for most people, and when work became organized into companies and organizations, the apprenticeship system was introduced. The background for the renewed interest in experiential learning is the development of global society. We live longer, we relocate more often, and we are assigned abroad more often. This increases the needs for assessing individuals’ learning, whether it is formal, informal, or non-formal. These three terms concern the context in which learning takes place (Illeris, 2007, p. 34).

Formal learning is intentional within a structured context with related certificates. Non-formal learning is also intentional and within a structured context, but no certificates are given. Informal learning is not intentional and not structured, and no certification takes place (Brinke et al., 2008, p. 52). This complicates the matter of assessment, as formal diplomas do not account for the complete stock of a person’s learning achievements, not to mention other valuable life experiences such as work experiences.

There is a need for accreditation of prior experiential learning (APEL) of entrepreneurs. The labor market asks for more mobility between industries. Competences (knowledge, skills, and personality) should determine whether an individual qualifies for a position, not out-of-date regulations or the rulings of unions. Individuals are increasingly mobile in
the labor market or are forced to be so due to its very dynamic nature. Migrants and refugees are entering the labor market with competences they cannot verify; since their certificates are in another language and from an unfamiliar university system, employers often do not consider them. Women and men are re-entering the labor market because of maternity or other leaves. Students are graduating from study programs for which there is no demand and need to qualify for other professions. All these developments call for assessment of learning to evaluate qualifications for specific jobs.

The term lifelong learning has come into the vocabulary. Work is no longer just activity source of money, but also of fulfillment and meaning. Organizations support this development by offering learning opportunities for their employees (Romaniuk & Snart, 2000). Society is changing so fast because of technological, social, and global developments that the individual has to upgrade himself all the time. People live longer, are healthier in old age, and are physically “worn out” later in life. Peter Drucker (1985), professor and management writer, has argued for delaying the pension age by about ten years. Individuals shift careers more often nowadays. In USA today, young people in their 20s change job every 18 months (Trunk, 2008), and older people choose a second career, often due to early retirement.

In a period of increasing longevity, with two career life spans of professional employment, for example, it is important for professional institutions, organizations, and corporations to objectively and quantitatively assess professional performance in either field to determine how well qualified the individual is to make a viable career change. Due to the transformation of organizational life, for example through flattening of organizational structures, which initially was a cost-saving priority, we see now that dynamic learning and adaptive organizations are being created (Ford, 2002). The environment is changing faster and faster (Carnall, 2003). Not least, the more globalized world puts pressure on companies to produce cheaper, faster, and better (Peterson, Lilja & Moen, 2008). Each of these claims calls for innovation to take place, and therefore there is a growing interest in innovation and entrepreneurship (Mahieu, 2006). This often happens when individuals of different competences are included in teams where they can draw on different experiences. But how can we assess “learning beyond diploma,” as experiential learning has shown to be a valuable source for competence and skills development? Assessment is often related to formal qualifications, but what about the assessment of experiential learning throughout life, for example from a career perspective?
CHAPTER 3

PROBLEM SPECIFICATION AND AIM OF THE STUDY

The nature and purpose of the research is discussed. Its aim, objectives, and research questions formulated. The research is justified and delimited. The organization of the dissertation is described and a comprehensive framework for assessing candidates for jobs is presented.
3.1 Nature and purpose

This research is in the management discipline, more specifically in human resource management concerned with staffing. It examines a relatively new phenomenon of advanced career changes by a special cadre of individuals who have advanced education and training, perhaps a doctoral degree in sciences, humanities, or engineering, and who at the dusk of their careers become entrepreneurial and strive to switch from an executive position in business to an academic post or vice versa (Baruch & Hall, 2004; Romaniuk & Snart, 2000).

After an often long career and much decision-making experience, an executive may wonder what it is like to pass on knowledge acquired through the lifelong school of rational reality to young and eager-to-learn university students. Alternately, a university professor, often with extensive consulting experience, who has spent many years lecturing to students, wonders what it takes in fortitude and experience to be a corporate executive. In some cases such individuals take action and begin to act on their motivations and views of reality. Although many corporations and universities welcome such individuals, they have virtually no rational, objective, and systematic methods to assess their professional qualifications for stepping into these new responsibilities (Fouad & Zao, 2000).

The conventional corporate process for hiring executives involves various consulting agencies and advisory groups to assess qualifications of applicants for top corporate positions. Many of these assessments are subjective and incomplete (Brinke et al., 2008). Assessing former university professors to determine whether or not they can step into the world of corporate responsibilities is problematic because their formal, theoretical qualifications are high. Conversely, the university process of hiring a former executive, even with an advanced academic degree, is also problematic. In both cases the experiential on-the-job learning process is totally different; the record of proven accomplishments is also totally different. Consequently, academics look with suspicion on former executives and executives look with suspicion on former academics (Baruch & Hall, 2004).

There is a growing need for an objective, unbiased and systematic assessment process for individuals who late in their careers want to change their careers. Consulting agencies do not specialize in these areas. Corporate human resource managers specialize in staffing and do not have sufficient experience to deal with former academics, and university level
hiring committees typically do not understand what contributions former executives can make to their educational programs and frequently pass these decisions to their deans (Baruch & Hall, 2004). These processes are inadequate. This research attempts to address this gap in both corporate staffing processes and university hiring approaches. The research further attempts to fill the gap by developing an assessment methodology both for academics who want to switch from academic to the corporate world at some point in their professional careers, and for executives who have a desire to become academics.

Research has confirmed that not all entrepreneurs are highly trained academically. They often learn primarily from experience (Cope, 2005). On the other hand, people with a long academic start to their professional lives can have a drive to go into business but no experience.

Entrepreneurs are capable of putting new business ideas into practice. West and Farr (1990, p. 9) define innovation as “the intentional introduction and application within a job, work team or organization of ideas, processes, products or procedures which are new to that job, work team or organization and which are designed to benefit the job, the work team or the organization.” Baumol (2002) defines innovation as “the recognition of opportunities for profitable change and the pursuit of those opportunities all the way through to their adoption in practice.” He regards innovation to be the product of the entrepreneur’s activity (Baumol, 2003, p. 47).

The academics in this research have made career shifts that have many of the characteristics of entrepreneurial behavior. They have recognized opportunities and have embarked on new careers. There have been some driving forces for them to do so, because it is normally easier for them just to continue their career paths. How can they succeed in career shifts? How does experiential learning take place and how can it qualify the individual to achieve certain goals? How do we value the knowledge and experiences that entrepreneurs have gained outside the walls of academia, and can we assess lifelong learning when individuals have experiences from alternating learning environments throughout their careers?

This research will deal with assessing experiential learning in general and will focus on the segment of entrepreneurial academics and businesspeople who have made a career shift into each other’s profession. This is a choice, as other segments could have been preferred.
The aim of the study is to make assessment methodology and tools for recruiting purposes, especially for entrepreneurial people with a lifelong career. In assessment, competence and employability come into focus. It is, therefore, an aim to understand these constructs. Obvious elements in these are learning from school and from practice because competence comes from learning. Therefore, learning in general and experiential learning in particular will be researched together with learning in a lifelong context.

The objective of the research is to produce experiential assessment methodology and tools in an experiential learning and lifelong learning context.

The research questions asked are:

- What is competence, what is employability, and how can these constructs be understood in relation to entrepreneurial individuals who shift careers from business to academia or from academia to business throughout their lives?
- How are the concepts of experience and learning related and what are the arguments for combining these concepts?
- How can experience be assessed for job qualifications?
- Which methodologies and tools can be used in assessing experiential learning and competence in lifelong learning cases?

The research method will be based on a narrative case methodology to try to understand the shift of careers for a sample of entrepreneurial individuals. Through telling their life stories, they express their perception of their experience, and from this the researcher can get meaning (Rae, 2000). The life story approach is a recognized research method. “A life story is first and foremost a text, to be read, understood, and interpreted on its own merit and in its own way” (Atkinson, 1998). Through these narrations the study will give input to the methodologies and tools that make systematic and quantifiable assessment of individuals for recruitment cases possible.

3.2 Justification and delimitations

The justification for this exploratory case research is based on the notion that professional evaluators such as executive search agencies (head hunters) or corporate based human resource departments frequently use subjective one-on-one behavioral assessment
approaches to determine whether or not a potential candidate coming out of an academic position has the potential to become a high level manager (an executive) or a high level manager has a potential to become an academic. From whatever side a candidate comes, he has learned something in the social context and environment he has been in. Diplomas, certificates, or other verifications are hardly enough to demonstrate his competence.

The research will focus on assessment methodology for academic executives in the business administration area, whether for positions in academia or practice. It will be seen in a lifelong career context. Assessment methodology for student assessment will not be covered.

3.3 Organization of the dissertation

The forerunner of this study of assessment of experiential learning was my licentiate dissertation in which I presented an autobiographical study (Graff, 2007). In that dissertation, methodology was developed for assessing one case. Now a more comprehensive framework is needed to handle multicase situations, as shown in Figure 3.1. The overall framework of the research, Figure 3.1, describes the research issues of this study dealing with recruitment of candidates for a job. It will follow a philosophy of assessment grounded in knowledge about how people learn and gain competence for positions in their professional lives. It should be noted that competence is acquired from both academic learning and experiential learning and that competence should meet the requirements that the employer sets up for the job. It will be noted from Figure 3.1 that the learning dimensions in academic learning are often unbalanced, illustrated by the bold arrow of the content learning dimension, and that they are often more balanced in experiential learning. The employer assesses the candidate based on a chosen assessment model through assessment tools and indicators showing how well the candidate fulfills job requirements. The model will not be described further here, but will be repeated in Chapter 9, where the study is discussed and concluded. Reading the text in between should be facilitated by Figure 3.1 with its overall framework for the study.
Figure 3.1: Comprehensive framework for assessing candidates for jobs

The dissertation is organized in chapters as seen in Figure 3.2.

Chapter 1, Introduction, sets the ground by describing recent developments in the environment that have influenced employee behavior. It shows a trend towards lifelong learning and a renewed acceptance of learning from practice. These trends have created an interest in assessment methodology for assessing competences based on both didactic and experiential learning when people are applying for jobs.

Chapter 2, Background, describes the high level of current interest in experiential learning, although this principle of learning goes back to the earliest times of mankind. People live longer and they are healthier longer. As they get older, they often find that they want to learn or to embark on new career paths. They often apply for academic courses or appointments outside their normal professions. This creates a need for assessing their competence for the course or assignment in question. Mature professionals with interesting learning careers have been the motivation for this study.
Chapter 3, Problem specification and aim of the study, presents the overall issues of the research. What is the study aiming at exploring, describing, analyzing, and verifying? Research questions are formulated. The research is delimited and concepts are presented.

Figure 3.2: Organization of the dissertation

Chapter 4, Literature review and theoretical explorations, gives an overview of research in the field. The concept of entrepreneurship is described, but only briefly, as the interest of this research is the entrepreneurial characteristics of career changing people, not starting a new business or developing new products. It is rather about people starting a new career. The characteristics of academic people shifting career are, however, much like the behavior of entrepreneurs in general; for instance their desire to achieve, high internal locus of control, and willingness to take risks (McClelland, 1961). Theories of learning will be explored as they are behind experiential learning too. The main focus will, naturally, be on the part of learning that is named experiential learning. What is experiential learning and what is special for this type of learning? The theory of one of the leading theorist within the field, David Kolb, will be extensively described, as he has set the scene since his seminal book, “Experiential Learning,” was published in 1984. That a person can learn from experience is, however, not new, and therefore other scholars in the field are also explored.

An important part of the theoretical exploration has been literature on the assessment of experiential learning. Although it has been accepted for hundreds of years that you learn from experience, for instance by Nielsen and Kvale (1999), more research is needed in order to gain knowledge about the assessment of particularly experiential learning.
Experience can come to an individual at any moment in his life and he has the opportunity to learn. But how do we assess this learning and how do we relate it to a specific assignment or job? How does experiential learning take place? Different attempts by theorists to contribute to assessing experiential learning will be described, inclusive of (1) scales of experientiality, (2) employability, (3) competence, (4) multiple intelligence, (5) Accreditation of Prior Experiential Learning (APEL), and (6) portfolios.

Chapter 5, Conceptual models for analysis, evaluation, and assessment, links theory and research of this research together. The licentiate dissertation had one case (platform case) as its field study background (Graff, 2007). Based on this platform case, a conceptual model was developed and tested on the autobiographical case. The conceptual model proved to be a suitable framework for analyzing the case and this model has, consequently, been used for the sample of this study. More assessment tools have been developed for analyzing respondents to form an assessment system for assessing experiential learning of prospective applicants for an assignment or position.

Chapter 6, Research methodology, looks at different relevant qualitative research methods for the study. Construct development and construct validity and reliability are discussed. Research methodologies for the platform case and for the sample cases are described. The sampling method and the sample are discussed.

In Chapter 7, Cases, the case stories of the respondents from the sample are described and analyzed. Further models and tools have been developed compared to the ones from the platform case analysis in the licentiate work (Graff, 2007). This chapter is extensive but the respondents have been described using the same systematic analysis procedures.

Chapter 8, Common factors and dimensions, attempts to extract the learning from the interviews and other data like curricula vitae (CVs). The cases are analyzed and different tables are developed to integrate the findings of the field research. Reflections are made on what has facilitated the case persons’ learning and made them more competent.

In Chapter 9, Discussion and conclusion, research results are discussed in the experiential learning context. Evidence is given for learning according to experiential learning philosophies and models. The validity and reliability of the assessment models are discussed and the analysis and evaluations are concluded.

1 A short abstract of the licentiate dissertation can be found in Appendix 1.
Chapter 10, Limitations and suggestions for further research, points out the limitations of the study and offers suggestions for future studies. Further research opportunities are suggested.

There is a List of references listing all source material referred to in the text and an Appendix with the abstract of the licentiate dissertation together with a few models besides a résumé of the assessment methodology and tools proposed.

The framework follows a logical arrangement, focusing on important issues to obtain the meaning of the research topics.

The next chapter will explore the theory within the field of assessment in a lifelong career context in order to develop an assessment methodology for mature academics or corporate executives wanting to shift careers. It will focus on the part of assessment theory that is relevant for lifelong learning assessment. It will examine the concepts of competence and employability, both of which are important aspects relating to experiential learning.
CHAPTER 4
LITERATURE REVIEW AND THEORETICAL EXPLORATIONS

This chapter is the theoretical foundation of the research. As the target group for this research is entrepreneurial academics who have changed position during their careers from academia to business or from business to academia, the chapter starts by looking at entrepreneurship and entrepreneurial learning. The concept of employability is introduced before going into theory of competence. People shifting jobs should be competent for their new jobs and employable for them.

The chapter then goes behind these concepts and look at how people could have achieved competence and employability. How do people gain knowledge through learning and how do they learn and gain skills through experiential learning? One consideration is that a candidate is competent for a job. Another is how he will get along with the people he is supposed to work with. The issue of personality is discussed and compatibility with the specific job explained as important elements of employability. As this research relates to assessing mature people, the chapter looks into concepts of lifelong learning. How do people manage their lifelong careers?

The main issue in recruiting people for positions is to choose the best candidates. Recruiters need assessment tools to do this. It is especially difficult to assess mature people because, in addition to theoretical learning, most of their learning comes from experience. Applicants’ personalities are also a vital part of employability and job success. How can assessors validly and reliably assess these people? The chapter discusses these issues.
The research strategy for literature studies has followed the idea that leading scholars within the experiential learning and assessment fields could “set the agenda” for the learning space of this study. They have formed the theoretical learning background for the author. Interesting leads from their references have been followed. Furthermore, the important journals in the field, such as Journal of Career Assessment, Journal of Vocational Behavior, Journal of Management Education, Human Resource Development Review, Management Learning, Advances in Developing Human Resources, and others have been examined, besides being on the SAGE Alert List of Journals issued regularly by email subscription to receive the latest articles.

The universe of study for this research consists of entrepreneurial academics with a lifelong career who have shifted careers from academia to business, or vice versa. It is, therefore, worthwhile looking at the concept of entrepreneurship in order to characterize these personalities and to give some background for their career shifts. It is also necessary to examine whether this segment of professionals learn in a special way. Section 4.1 will deal with entrepreneurship and entrepreneurial learning. Section 4.2 introduces the concept of employability. Section 4.3 looks in some detail into the important concept of competence. Section 4.3.1 gives a short insight into learning theory and introduces an important learning model that is also useful for describing experiential learning. Section 4.3.2 describes how experience and learning are linked. Important experiential learning theories are presented, especially Kolb’s experiential learning theory. His theory has been so widespread through the last decades that many scholars have lived with the theory and tried to test its validity. Individuals participating in the research’s empirical study have been influenced by learning from experience and learning from education. It is, therefore, important to look at how experiential learning in education and practice are related. How can both these areas contribute to learning for the individual? 4.3.3 describes the importance of personality in the context of competence. Section 4.4 looks especially at experiential learning throughout life. How do individuals acquire learning in a lifelong context and how does it add to individual integrity? Section 4.5 introduces experiential learning assessment theory and methodology. It starts with assessment methodology for competence and employability. It then looks at assessment methodology for experiential learning and continues with assessment methodology for personality, learning styles, prior experiential learning (APEL), and portfolios. It ends with a critique of portfolios and the concept of assessment centers. The chapter is then summarized and integrated.
4.1 Entrepreneurship and entrepreneurial learning

As I am interested in entrepreneurial people shifting careers either to or from academia, the research will use a sample of mature and entrepreneurial academics or businesspeople who have embarked on new careers. It might, therefore, be useful to look at what it means to be entrepreneurial and whether these types of people learn in a special way.

Theories of entrepreneurship can be categorized into three main types (Smith, 2006):

Economic
- Organizer (Cantillon); Risk-taker (Knight); Innovator (Schumpeter); Opportunity-taker (Kirzner)

Psychological
- Need for achievement (McClelland)
- High internal locus of control
- Willing to take risks
- Need for independence and autonomy

Behavioral/Processual
- Stages of the process

The above divisions show that research in entrepreneurship focuses not only on economic aspects, but also takes interest in the personal characteristics of entrepreneurs. These theories do not, however, explain why entrepreneurship happens for specific individuals. That the entrepreneur is an organizer (Cantillon), a risk-taker (Knight), an innovator (Schumpeter) or an opportunity-taker (Kirzner) is a characteristic and gives no direct explanation of learning processes.

McClelland (1961) gets closer as he looks at the individual and characterizes some psychological factors behind being entrepreneurial: need for achievement, high internal locus of control, willing to take risks, and need for independence and autonomy. Looking at these characteristics you can better ask if they are given at birth or if they are formed through experience, since individuals show different kind of personalities. The extent to which individuals are able to utilize entrepreneurial opportunities will very much depend on the entrepreneurial capability they develop through prior experience. Learning in an entrepreneurial context deals with recognizing and acting on opportunities, knowing how to organize ventures, and so on. Entrepreneurial learning is about “knowing” but also about “doing” and having an understanding of “what works” and a feeling of “one can do it” (Rae, 2000).

Drucker (1985), from a similar perspective, is a proponent for the view that innovators most likely will innovate within their fields of competence. He formulated seven sources of ideas: unexpected occurrences, incongruities, process needs, industry and market structures, demographic changes, changes in perception, and new knowledge. People
within a profession are most likely to get ideas within their profession and be motivated to change things for the better. Experience has given them insight and competence to be able to innovate, and if the right motivation is there, these people will be entrepreneurial and innovate new things. Likewise, within the academic field, researchers develop new theories and models, and practitioners within the academic field such as professors and lecturers devise new ways of teaching and implement them in new study programs.

The combination of learning and entrepreneurship has been recognized by many to be of critical importance for economic prosperity and the wealth of nations. In policy, international organizations such as the European Union, OECD and the World Bank have promoted learning for economic growth and related this to the stimulation of entrepreneurship in member states (Mahieu, 2006). In the current economy, jobs are rarely “for life” and career paths are changing. Project-based work, alternating with periods of self-employment, will be more usual in the future. This requires entrepreneurial skills, innovation, creativity and flexibility. Also, entrepreneurship education encourages the combination of theoretical knowledge and practical application (Heinonen, 2007).

Recently, research on entrepreneurial learning has begun to conceptualize learning as a process, rather than an outcome. Learning through experience is seen as a continuous process which every individual lives through. This makes it an extremely complex and dynamic process. Learning is often an informal process and this is typically true for entrepreneurs. Entrepreneurial learning is frequently characterized as unintentional, accidental, and a result of critical incidents. For small and medium-sized enterprises (SMEs), learning is important for survival and growth. Previous or older entrepreneurs can serve as mentors for new entrepreneurs. Sullivan (2000) argues for the importance of double-loop learning (Argyris & Schön, 1978), where you question the governing variables behind an issue in your decision-making, and learning from experience or critical incidents as important learning cases. Cope and Watts (2000) come to similar conclusions when they focus on the learning of entrepreneurs in relation to personal development and business development. Their findings show that entrepreneurs often face prolonged traumatic critical periods or episodes. It is these critical incidents in the life of the entrepreneur that result in fundamental higher-level learning. Their research focuses on critical moments in the history of the business and of the owner or manager. Marketing mistakes, financial crisis, administrative errors, and critical relationships are some of these incidents that can lead to change:

“In metaphorical terms, certain types of critical incident could be viewed as “eruptions” within these critical episodes.../...what is evident is that the critical incidents described here accelerated this process of learning and growing self-awareness, and therefore often proved to be seminal moments within these process of change” (Cope & Watts, 2000, p. 113).
The critical events are thus good sources for learning. Rae (2000) produces similar findings when he suggests that entrepreneurs go through a series of “life stages” in terms of developing their entrepreneurial careers. He researched entrepreneurial learning through the life-stories of entrepreneurs. His narrative approach creates a “living theory” of entrepreneurship and showed that people develop entrepreneurial capabilities over time. This happens in so-called “learning episodes.” Rae further concludes that narrative based research has the potential to create new insights into entrepreneurship. These findings can be valuable not only for entrepreneurs but also for those who educate, support, or work with them. Down and Warren (2008) equally suggest that continued research into the narrative of entrepreneurial identity is required, as well as the applications of narrative theory in the classroom and the business incubator. The experiences of entrepreneurs can thus support the learning processes in higher education.

What then does entrepreneurial learning consist of? In his conceptual article, Cope (2005) proposes three interrelated elements of entrepreneurial learning that are important and need further consideration:

- Dynamic temporal phases
- Interrelated processes, and
- Overarching characteristics.

The dynamic temporal phases indicate that entrepreneurial learning must be seen as a process that consists of different phases in life. New situations, as well as the experience of learning, are a product of one’s evolving learning history. Entrepreneurs are action-oriented and learn through their experiences. This is related to the how of entrepreneurial learning. Further, the content, or what, question about entrepreneurial learning also needs more attention. These areas are: learning about one’s self, learning about the business, learning about the environment and entrepreneurial networks, learning about small business management, and learning about the nature and management of relationships. The appearance of the internet and e-business, for example, have forced many small and medium sized companies to adopt these techniques to their business processes and learn new concepts and procedures (Bengtsson, Boter & Vanyushyn, 2007; Sophonthummapharn, 2008).

Politis (2005) also describes entrepreneurial learning as an experiential process. She defines three important components in the process of entrepreneurial learning: the career experience of entrepreneurs, the transformation process, and entrepreneurial knowledge. This implies recognizing and acting on entrepreneurial opportunities and coping with the liabilities of newness. She mentions “experientially required knowledge” or wisdom as a
dimension of entrepreneurial experience that needs more attention. It seems that Politis regards accumulation of experience over a life course as an important ingredient of entrepreneurial behavior. Also Wilson (2008) has formally recognized the need for experience in both business education and entrepreneurship.

Huovinen and Tihula (2008) use a single case in their study of how entrepreneurs learn from previous experiences. They do this in relation to so-called habitual entrepreneurs (entrepreneurs who have owned at least two different firms) and their characteristics and entrepreneurial careers. They ask what the entrepreneur learned from previous entrepreneurial experiences and how this can be seen in the management of the current business. Entrepreneurial experience often lowers the threshold for entrepreneurs and facilitates starting a new business. Entrepreneurial knowledge is influenced by challenges that the entrepreneurs have met during their careers.

Rae (2000, p. 154) found that an important ingredient for an individual to be entrepreneurial is his confidence and self-belief. Figure 4.1 shows important factors interplaying in this:
- Confidence, self-belief and self-efficacy
- Personal values and motivation to achieve
- Setting and achieving ambitious goals
- Personal theories derived from experience
- Known capabilities – existing skills and knowledge
- Relationships through which social learning occurs
- Active learning: the ability to learn through and use learning in action

Figure 4.1 A conceptual model of entrepreneurial learning
Source: Rae (2000, p. 146)
It is seen that personal theory, known capabilities, active learning, and relationships are prerequisites for the individual’s confidence and self-belief. The individual feels strong and sets ambitious goals, which give the individual a drive for achievement and ultimately a motivation to reach his goals.

The literature on entrepreneurship, management and entrepreneurial learning so far suggest that entrepreneurial learning is a process that has a clear temporal dimension. Entrepreneurs seem to learn from certain critical incidents but they also learn from experiences during a longer period. This period is often divided into different episodes. Incidents can also be opportunities. It is generally regarded that research in this area needs further attention, especially in relation to the narratives of entrepreneurs and the stories these professionals tell about their careers and their learning experiences. An interesting point made by Politis (2005) is that experience is not only related to learning but also to knowledge. She therefore suggests that both entrepreneurial career experience and entrepreneurial knowledge are important. However, it is the intermediate process between the experiences of entrepreneurs and the transformation of the experiences to knowledge that calls for further studies. An avenue for research is thus experiential learning and the assessment of entrepreneurs’ career experiences.

4.2 Employability

The overall objective of this research is to suggest methodology for competence assessment of mature entrepreneurial individuals who want to shift jobs. The employer finds it difficult to assess the knowledge, skills, and personality of such applicants, because their exam certificates typically are older and because they presumably have learned much through life that has enhanced their employability.

Employability is a construct that has become more attractive during the last decade. It is often related to the assessment of students in international standardization practices, for example the Bologna process that occupies many administrators at universities. Knight and Yorke (2003) define employability as “a set of achievements, understandings and personal attributes that make individuals more likely to gain employment and be successful in their chosen occupations” (p. 5). They point out that employability should not be confused with the acquisition of a job. Provision of experience, whether within higher education or without, is not a sufficient condition for enhanced employability.
either. A curricular process might facilitate the development of prerequisites appropriate to employment, but does not guarantee it. Knight and Yorke (2003, p. 4) further argue that employability is context-dependent. An individual’s set of attributes and achievements may have general value, but can be insufficient in specific situations. It is an individual thing, and employability must at the end be assessed by an employer. Knight and Yorke see employability as being influenced by four broad and interrelated components as seen in Figure 4.2.

The E-component of the model suffuses the other contributions to employability. Personal motivation is important for any job, as it is the engine for excitement and performance in the job. The U-component is for understanding and has more depth than the common term “knowledge.” The S-component is skills that the person, has although caution should be taken here because skills also are context dependent. The M-component is the person’s metacognition. In the model it stands for: knowing what you know, knowing how it can

### Legend:

- **U**: Understanding
- **S**: “Skills”
- **E**: Efficacy beliefs, students’ self-theories and personal qualities – of critical importance is the extent to which students feel that they might “be able to make a difference” (not every time, but in a probabilistic way).  
- **M**: Metacognition, encompassing self-awareness regarding the student’s learning, and the capacity to reflect on, in and for action.

**Figure 4.2: The USEM model**

Source: Knight and Yorke, 2003 p. 8
be used, and knowing how you get new knowing; in other words reflecting on the learning process and learning how to learn.

In Romaniuk and Snart’s (2000) opinion employability should also include the marketing side because, in addition to determining, attaining, and maintaining the skills needed to work, individuals need the skills to market themselves in order to get a job and maintain it. It is not enough to be very knowledgeable, very skilful, and have fine personality characteristics. The combination of these things should be right for a specific job and be acknowledged by an employer. Often, the construct “competence” is perceived more narrowly towards skills for a job, but has developed more in the direction of “employability.” “In business today, one’s true security is found in one’s résumé, the experience and skills that make up one’s employability” (Baruch & Hall, 2004, p. 256). From this quote it is seen that the more experience and skills an individual has, the more employable he is. It is, however, recognized that it has no meaning to talk about competence without specifying what the competence is directed towards. A person can have a great deal of knowledge and skills of a nature that is not demanded in a specific job, where other competences are needed in order for a person to be employable.

In a market economy, usually only competent people are employable. They are the only ones who will be hired unless there is a significant shortage of workers. In such cases employers might employ less competent people for training. Looking back at Figure 4.2, it is seen that especially the E and M factors are difficult to assess for competence whereas the S and U factors normally are assessed through looking at CVs. Personality factors are today, however, rather frequently assessed through personality tests, but they deliver personality typologies unrelated to the working situation in which the person is expected to perform. The term “employability” is then regarded to be a more comprehensive term covering all aspects of a person’s competences towards a specific job.

Knight and Yorke (2003) have made a list of 39 aspects of employability which are shown in Appendix 2. Employers usually focus on specific competence predictors (capacities or capabilities) to assess a candidate. Being capable can be defined as “having general capacity, intelligence, or ability; competent; gifted” (Shorter Oxford English Dictionary, 2003). Capabilities/capacities will be described below. Lock and Hogan (2000) talk about technical fit, personal fit, management fit, and organizational fit as
variables to consider when providing career assessment advice. More specifically, these issues may be related to predictors for applicants’ successful outcomes.

It appears that the construct “employability” is multifaceted and not only relates to knowledge and skills. It contains a range of other characteristics that should be embedded in people for them to be competent for jobs. Some of these are characteristics of entrepreneurial people, for instance efficacy beliefs and metacognition, and they should be considered in the methodologies and tools to be developed in this study for competence assessment for specific jobs. If a person is competent for a job, he has a high score on an employability scale.

4.3 Competence

In recruiting, the concept of competence is a crucial point. It has already been shown in Figure 3.1, Comprehensive framework for assessing candidates for jobs, that competence is a main ingredient in assessing candidates for jobs. The figure also shows how competence was formed as an outcome of academic learning and experiential learning. Competence has something to do with qualifications but also something to do with personality. “Qualifications are person bound characteristics which are acquired by the individual through a form of learning” (Bramming & Larsen, 1995 p. 13). Competence, on the other hand, deals with how the individual uses those qualifications. “Competence cannot be observed directly, but can only be inferred from performance” (McMullan et al., 2003, p. 287). Furthermore, competence often has an authority dimension in the way that the individual has the authority to make decisions within a given area.

Epstein and Hundert (2002) propose this definition of professional competence: “The habitual and judicious use of communication, knowledge, technical skills, clinical reasoning, emotions, values, and reflection in daily practice for the benefit of the individual and community being served” (p. 226). Their world is the medical doctors’ world. Qualifications can be divided into process dependent and process independent qualifications. Process dependent qualifications are directly related to the work assignments whereas the independent qualifications have no direct relation to them. Qualifications can be general, specific, or personality based. The specific qualifications are related directly to the work assignment; the general qualifications are indirectly related to the work assignment through giving more understanding of the work’s context.
Personal characteristics and attitudes are connected to the personality of the individual and influence the work process (Bramming & Larsen, 1995; Knight & Yorke, 2003).

All recruitment has to do with finding the right person for the right job. In doing this, predictors (independent variables) are used to predict probable outcomes (dependent variables) of hiring the applicant. The predictors are usually intelligence, knowledge, skills, proficiency, and experiences (Prien, 1992):

- Intelligence can be measured quantitatively, ending up in an intelligence quotient. Its origin is the French psychologist Alfred Binet, 1905. Four capacities of a person are usually measured: capacity for problem solving, capacity for learning skills, capacity for abstract reasoning, and capacity to adapt to environment.
- Knowledge is the person’s fund of information about a subject.
- Skills are the person’s ability to perform specific tasks.
- Experience is based on knowledge, practice and habit within a special field. Trial and error is part of experience too.

Another area of research deals with intellectual capacities such as described by Prien (1992). He writes that the delimitations of these concepts are not clear and that it might be more convenient to distinguish between theoretical knowledge achieved through education and practical knowledge achieved through working life. In the occupational psychology of the 1950s it was realized that predictors for successful outcomes should be based on more factors than Binet’s intelligence measurement, so more factors came into the fore: verbal, linguistic capability; verbal, linguistic communication capability; spatial capacity; numerical capacity; inductive logical thinking capacity; perceptual capacity; and memory.

In the 1960s the Structure-of-Intelligence (SI) model was created based on experiences from pilot training. According to this theory, intelligence was based on five operations: receiving of information (cognition); storing of information (memory); creation of new thinking (divergent production); searching for accessible memory (convergent production); and evaluation of accessed information (evaluation).

In the 1980s so called Meta analysis was performed and the validities of different test types were evaluated. The results showed that there were no big differences in validity between different test types. This means that it is possible to use fewer, more general tests. Decision-making in the modern world has become still more complex, implicating
that common intellectual capacity is still more demanded in working situations. A general intelligence test should, according to this perspective, be carried out – at least at management levels. The nature of the job should, however, always be taken into consideration.

Additionally, personality should be taken into consideration. “Personality can be defined as the more or less fixed and durable part of a person’s character, temper, intellect and physics which determines his unique adaption to his environment” (Prien, 1992 p. 111, translated). Factors such as extroversion, emotional stability, sociability, trustworthiness, and openness to new experiences are predictors for job success as well. On the management level, four areas of competence should be considered: vision, communication, decision-making, and using oneself (Prien, 1992, p. 126). A top-level manager has to work in complex decision situations. Many advisers’ opinions should be taken into consideration, and decisions should be made that are understood and accepted by stakeholders and with respect for them.

According to Prien, personality tests are of doubtful value for recruiting managers. They are neither valid nor reliable for predicting success as managers. “The recruiters should, therefore, not base their evaluations on doubtful personality tests, but rely on their own impressions, experiences, and intuitions.” (Prien, 1992, p. 137, translated). It is also difficult to measure an applicant’s motivation for a job. Three motivational factors are especially interesting in a recruitment situation: what the applicant seeks to achieve with the job, the intensity and concentration the applicant shows by fulfilling his ambitions, and the perseverance he shows in performing his job. “Our general selection model presumes that we can assess motivation in the same way as we used to assess intelligence. But motivation is not directly measurable” (Prien, 1992, p. 157, translated).

For assessing persons with lifelong careers, it seems to be more important to assess personality characteristics and motivational factors than the traditional intelligence and personality tests. Personality tests typically only classify persons into typologies that might be too rigid to be useful. Job positions often have quite specific claims which often cannot be tested through normal standard test procedures. Competence is a complicated construct that could need elaboration. Bramming and Larsen (1995) talk about five aspects of competence: Professionalism and personality; individual and organizational; firm specific and general; adaptive and developing; and flexibility. Their framework
seems to be good in explaining the competence construct and will be used in the following elaboration of their writing:

1. Professionalism and personality: It is usual to talk about formal competence and real competence. Formal competence consists of knowledge, abilities, and skills acquired through education or training and evaluated through a formal process (for instance an exam). Real competence is the competence needed to perform a specific work assignment and can have been acquired through other means than education, such as training in practice. Knowledge and skills are necessary for performing the job, but affective factors are necessary too. Motivated employees will probably be more effective and efficient than non-motivated employees with the same knowledge and skills.

2. Individual and Organizational: Competence gives meaning as a person uses his qualifications on a specific work assignment. He uses his cognitive ability (thinking power), his affective ability (feelings, emotions), and his cognitive ability (will power). In an organizational context, individual competence is skills and abilities in connection with a work assignment and the ability to work together with colleagues (Bramming & Larsen, 1995). Some scholars talk about organizational competence too, stating that (individual) competences are built into technologies, processes, routines, and products, and that organizations like individuals learn. When people work together and pool their competences synergy can emerge (Bartlett & Ghoshal, 1995; Grant, 2005).

3. Company specific and general: Competence can be special for a company, in which case the company has to educate or train people for them to perform their jobs. This can be done by special courses, through training in the company, or at company academies. Competence can also be general and go into typical jobs all over the industry. A transport company needing new drivers can address truck drivers in general. Company specific competence can be a competitive factor and for the employee a strength in good times, but a weakness if he is laid off in times of recession and he has to apply for jobs in other companies.

4. Adaptive and developing: Environmental factors influence companies even more than before, so employees should be adaptive and willing to change in work processes and assignments. This is the key to sustainable competitive advantages (Bartlett & Ghoshal, 1995; Marinov & Marinova, 2004).
5. **Flexibility:** Companies should see themselves as partners in networks of customers, suppliers, institutions, and other stakeholders and not as independent, isolated entities. This means they should be flexible and sometimes adapt to the environment, but also sometimes influence the environment. For both organization and employee this means flexibility in processes, assignments, work organization, and other organizational matters.

Competence is also about the capability to perform certain tasks. Stephenson (1998) talks about capability in the context of lifelong learning. “Capable people have confidence in their ability to take effective and appropriate action, explain what they are seeking to achieve, live and work effectively with others, and continue to learn from their experiences, both as individuals and in association with others in a diverse and changing society.” He writes that capable people have the confidence to apply their knowledge and skills within diverse and changing situations and to continue to develop their specialist knowledge and skills.

But how can competence be developed from practice? There is much focus on management education and training in the corporate world (Baruch & Hall, 2004; Ladyshewsky, 2007). Managers are perceived as being important for achieving the company’s mission and objectives. Managers and leaders are supposed to set the agenda for running and developing the company and be role models for employees. Managers/leaders perform in interaction with their organization and the environment. They perform their work and make decisions, and thus they become more experienced – they learn – sometimes by trial-and-error; sometimes by thorough reflection; sometimes by copying others; sometimes by intuition. Any manager/leader has a set of knowledge acquired from education earlier in life. He acquires skills from his performance in his job, and he uses his personality in management/leadership. His management is influenced by academic education, learning from practice, and the motivation he puts into the job. He is constantly challenged by external factors that put demands on him. How can he cope with all these challenges? Management education and training can happen at universities, colleges, and training institutions. Executive MBAs have become popular for managers in recent years. Seminars and shorter courses are traditional ingredients in managers’ training. Recently, mentorship has become popular, where managers can discuss issues with senior, more experienced managers – typically from other departments or companies – to bring in new perspectives, and where the senior managers can share their experiences with the younger managers.
So it is not only through formal education that people learn. We learn all the time, as explained by Dewey (1938) early in the last century. Managers, therefore, learn all the time they are managers, and this makes them more experienced in a business decision-making context too. By dealing with actual and menacing problems with other managers, he learns (action learning) (Revans, 1985; Larsen, 2004). Much business life today is so complex because technological development, business system changes, business model challenges, and globalization make learning happen in practice. Business schools will often be behind present developments, because they have to research phenomena in practice before they can explain it in theory. This means that a manager gains much of his learning from practice. It is also acknowledged that the manager, after reflecting on his experience, tries to conceptualize and form new theories by using his theoretical learning from academia too. Then he tests his new solutions in practice and gains a new experience (Kolb, 1984). In this way, theory and practice are connected and indispensable to each other.

As argued before, the concept of competence for practical purposes is very job specific. Companies/organizations usually ask for job specific competences. The Council for Graduate Medical Education can be used as an example. The Council has defined six areas of competence: patient care, medical knowledge, practice-based learning and improvement, interpersonal and communication skills, professionalism, and systems-based practice (Epstein & Hundert, 2002). They have advanced the definition of professional competence of physicians and trainees that goes further into these areas, as shown in Table 4.1. It shows that cognitive, technical, integrative, context, relationship, affective/moral, and habits of mind are competence dimensions. The author has adapted the table by adding two columns: one for academic learning and one for practical learning. The goal is to evaluate which of the competence dimensions originated from academic learning and practical learning, respectively. This is, of course, a rough categorization, as learning originates from many sources, but in essence much competence is primarily acquired from practice, for instance “applying knowledge to real-world situations,” “using tacit knowledge and personal experience,” and “physical examination skills.” Other competences are primarily acquired from academic learning, for instance “core knowledge,” “basic communication skills,” and “abstract problem solving,” whereas for instance “incorporating scientific, clinical, and humanistic judgment” must be regarded as originating from both academic and practical learning.
Table 4.1: Dimensions of professional competence

<table>
<thead>
<tr>
<th>Cognitive</th>
<th>Competence mainly from academic learning</th>
<th>Competence mainly from practical learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Core knowledge</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Basic communication skills</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Information management</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Applying knowledge to real-world situations</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Using tacit knowledge and personal experience</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Abstract problem-solving</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Self-directed acquisition of new knowledge</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Recognizing gaps in knowledge</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Generating questions</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Using resources (e.g., published evidence, colleagues)</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Learning from experience</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Technical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Physical examination skills</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Surgical/procedural skills</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Integrative</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Incorporating scientific, clinical, and humanistic judgment</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Using clinical reasoning strategies appropriately (hypothesico-deductive, pattern recognition, elaborated knowledge)</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Linking basic and clinical knowledge across disciplines</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Managing uncertainty</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Context</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Clinical setting</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Use of time</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Communication skills</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Handling conflict</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Teamwork</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Teaching others (e.g., patients, students, and colleagues)</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Affective/Moral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Tolerance of ambiguity and anxiety</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Emotional intelligence</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Respect for patients; Responsiveness to patients and society</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>• Caring</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Habits of Mind</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Observations of one’s own thinking, emotions, and techniques; Attentiveness</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Critical curiosity</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Recognition of and response to cognitive and emotional biases</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>• Willingness to acknowledge and correct errors</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

Source: Adapted from Epstein and Hundert (2002, p. 227)

This example is from the medical world, which is particularly practice oriented, but many disciplines within the business field are as well. In this way, the importance of practical learning for competence can be sensed, giving input to assessment counselors about what to assess. Table 4.1 can be a good inspiration for setting up assessment criteria in the business administration field as well, as much learning in this discipline is regarded as
experiential. From the table it is also sensed how much attention the medical field pays to the practical part of learning in competence assessment. In business administration, there could likewise be set up a multitude of dimensions of professional competence as in Table 4.1. The concrete list of dimensions would depend on the concrete profession or job. Although there are many commonalities across business administration sectors, a list for a university professor, for example, would look different than a list for a business executive in the mining industry. It will always be the nature of the job that determines the dimensions of professional competence and the list should, therefore, be tailor made for every job position.

This section has dealt with competence and some of the main ingredients of competence, and it is argued that competence is acquired from both academic learning and learning from experience. To assess learning, it is important to know how learning takes place. The next section will deal with theory of learning in general. Afterwards it discusses whether experiential learning is a special kind of learning and how it differs from learning in general.

4.3.1 Knowledge and learning

Developmental psychologists traditionally divide up a life into four phases: Childhood, youth, adulthood, and the mature age. These form different stages in the development of individuals (Illeris, 2007). In a career context, these stages of development can be regarded as underlying forces in a person that will influence the individual. In top of that, an adult will be able to identify a business career in a developmental context.

For assessing learning and giving recommendations for management development, it is important to know how learning takes place. Human learning takes place in many ways, from the simplest learning by animals to advanced learning that is only supposed to be mastered by humans. The Russian physiologist Ivan Pavlov (1849-1936) showed how dogs learned that the ringing of a bell meant food. He called it signal learning or classical conditioning, where the saliva from the dog was conditioned by the ring of the bell, if not the food itself. In American learning psychology from the beginning of 1900 and up through the 1970s, the dominant learning types were trial-and-error learning and operant conditioning. Edward Lee Thorndike (1874-1949) was a proponent for the trial-and-error view. One learns what feels satisfying and an individual will repeat his satisfying behavior and in this way strengthen his learning. If something seems unsatisfying,
learning will not take place or will be weakened. Burrhus F. Skinner (1904-1990) introduced the term “operant conditioning” to say that an individual is conditioned to do something when he is rewarded (Knowles, Holton III, and Swanson, 2005; Säljö, 2000). These theories on learning have been collected under the heading of “behaviorism” and were most common until the 1960s when, successively, learning became related to cognitive processes and the ideas of individuals constructing their own knowledge: cognitivism and constructivism. During the mid-1980s the ideas of learning gradually widened and learning became a concept that increasingly incorporated social processes. These latter theories of learning can generally be collected under the heading “socioconstructivist” (Dysthe, 2001; Mahieu, 2006).

A learning process can proceed in different ways. Illeris (2007a, p. 89) places learning into four typologies:

- **Cumulation**: Mechanical learning. Recalling and applying the learning in situations mentally similar to the learning context.
- **Assimilation**: Learning happens as assimilation. New impulses are linked to a pattern already established.
- **Accommodation**: One breaks down an existing pattern and transforms it so that the new situation can be linked in. The result can be recalled and applied in many different, relevant contexts.
- **Transformation**: Personality development by simultaneous restructuring in the content, the incentive and the interaction dimensions. This typically occurs as the result of a crisis-like situation caused by challenges experienced as urgent and unavoidable.

The learning types described are all useful for understanding the different forms through which learning can take place – each dedicated to special learning situations and environments. They are ordered so that later types demand more mental resources than former types – transformative learning is usually more demanding than assimilative learning. The last two forms may be especially useful in understanding career change, as people break down existing patterns when entering new jobs. Entrepreneurial learning as described in Section 4.1 must be a learning occasion that often has to use transformative learning to succeed because it is complex and challenging and presents many obstacles to overcome.

Illeris’ (2007a) opinion of learning is very clear. He sees these learning processes progress within three equally important dimensions: content, incentive, and interaction (see Figure 4.3). There is an internal mental assimilation, and an adaptation process in which impulses from the interaction are integrated with the results of earlier learning. This adaptation contains both content and incentive and therefore we have the three dimensions of learning: content, incentives, and interaction.
The \textit{content} dimension contains knowledge, understandings, skills, abilities, attitudes and the like. The \textit{incentive} dimension contains emotion, feelings, motivation and volition. The social dimension of \textit{interaction} contains communication and cooperation. The environment is for this purpose primarily defined as the business environment, but outside this is, of course, all other environments, including the society that the person interacts in.

The first position in the Illeris learning model concerns the content dimension. Traditionally, this has been regarded as the only learning dimension and much school learning is dedicated to giving students facts, models, and information. The second position is the incentive dimension of learning. Illeris regards this as an important and integrated element in all learning. The individual’s “emotional intelligence” results from his motivational, emotional, attitude and volition patterns, and this is as important as his knowledge and skills (the content dimension). The third position is the interaction dimension of learning. Illeris states that “all learning is ‘situated,’ i.e. that it takes place in a certain situation, a certain learning space, which both determines the learning possibilities and marks the learning process and the nature of the learning that takes place” (Illeris, 2007, p. 96). An individual can interact with his environment in many ways depending on the social opportunities and threats. He perceives, experiences, and participates in a social context and from this he learns.
Illeris regards his learning model as valid for all learning. The three elements of content, incentive, and interaction will always be there when learning takes place. The weight each of the three elements will have in any concrete case will vary, however. We acquire or understand something that we perceive as important for us and we have incentives to use this knowledge in a social, interactive context, because no one operates in a vacuum. We also learn by “continuity,” where what we learn in the moment builds on previous learning, and in an “interaction” way where we interact with something or somebody (Dewey, 1938).

It is not only interesting to know how we learn; another appropriate question would be when we learn Ninety percent of our learning is subconscious (Evan-Jones, 2008). That means that we learn every day in everyday situations without noticing it. Also in schools we learn, but this is often in a more abstract form; our motivation to learn might not be high in concrete situations, which impedes our learning. Also at workplaces we learn, and this is often in a more practical form than in schools. Much of the learning is based on the principle of learning by doing. This learning is directed to fulfilling special job functions, and if we are successful in doing this we will be competent employees.

“But our learning is often unintended and frequently unnoticed, since we are often so familiar with our life-world that we take it for granted, live within the flow of time and just adapt our behavior – almost unthinkingly – to changing circumstances. Each adaptation means that we also gradually alter our knowledge of the situation, although we are not always aware of it. This can be seen if we ask people to describe their learning experience, as I did in my research, and they found it tremendously difficult to describe precisely how, or even when, they learned unless they described formal learning in which they had a teacher” (Jarvis, 2007, p. 22).

This quote by Jarvis shows that the perception of learning is primarily focused on school learning. It is regarded as more prestigious to have attended education programs at schools than having learned from practice. The word “academic” still has an aura of glory that most other professions do not have, and although we might be able to localize some learning experiences from practice, we prefer to communicate academic learning occasions because they give immediate social acceptance.
For a researcher, it describes a difficulty if learning by respondents cannot be retrieved in memory. When we participate in courses at school, we can refer to a course in statistics for instance, but can we claim we learned and how much we learned? How will that learning be dependent on incidents from practice where we get “aha” experiences linking practice to the theoretical course? For some people most learning happens in practice. Aboriginals have no other learning, and women being housewives most of their lives learn mainly from practice.

If we acknowledge that learning also takes place outside of schools, how do individuals learn then? Learning at schools is usually recognized to be cognitive learning, where logical/mathematical thinking is at fore together with linguistic thinking. Some segments of people are not exposed by these means of learning – and yet they learn. This recognition gave thoughts to additional ways of learning – the theory of multiple intelligences. Howard Gardner from Harvard Graduate School of Education introduced the concept of multiple intelligences in his book “Frames of Mind” (Gardner, 1983). He found that intelligence based on the traditional notion of intelligence, based on I.Q. testing, is far too limited. He identified eight intelligences, although he claimed that it would be possible to identify many more – maybe thousands. The eight intelligences are (Armstrong, 2008):

- Linguistic intelligence (“word smart”)
- Logical-mathematical intelligence (“number/reasoning smart”)
- Spatial intelligence (“picture smart”)
- Bodily-Kinesthetic intelligence (“body smart”)
- Musical intelligence (“music smart”)
- Interpersonal intelligence (“people smart”)
- Intrapersonal intelligence (“self smart”)
- Naturalist intelligence (“nature smart”)

Traditionally the first two intelligences are honored in society. We measure linguistic and logical-mathematical intelligence in the traditional I.Q. test, but we should also honor the other intelligences in which some people are gifted: architects, artists, musicians, naturalists, designers, dancers, therapists, entrepreneurs, and others. Gardner (2006, p.4) writes: “According to MI [Multiple Intelligence] theory, all human beings possess a number of relatively autonomous cognitive capabilities, each of which I designate as a separate intelligence. For various reasons people differ from one another
in their profiles of intelligence, and this fact harbors significant consequences for schools and the workplace.” It follows from these predispositions of humans that they learn in different ways and that lecturers should address these predispositions by mixing their lecturing techniques (Armstrong, 2008), for instance:

- Words (linguistic intelligence)
- Numbers or logic (logical-mathematical intelligence)
- Pictures (spatial intelligence)
- Music (musical intelligence)
- Self-reflection (intrapersonal intelligence)
- A physical experience (bodily-kinesthetic intelligence)
- A social experience (interpersonal intelligence)
- An experience in the natural world (natural intelligence)

Students pick up different information from a lecture, partly depending on their predisposition of intelligence, and it follows that a lecturer should address the eight intelligences as much as possible in a lecture or in a study program. At workplaces, these forms of intelligences could be demanded in different job functions. The emergence of communication through the new digital media could very well call for people with more spatial and musical intelligence, and for outward looking jobs people with interpersonal intelligence.

In this section we have seen that learning is a multifaceted construct. Knowledge can be obtained by several means and is always situated. The Illeris model of learning processes and dimensions in Figure 4.3 seems to be a promising model for understanding the main preconditions of learning: content, incentive, and interaction situated by the environment and influenced by society. It is also recognized that we learn all the time and not only intentionally, for instance when we go to school. At schools, cognitive learning has been predominant, but the theory of multiple intelligences has opened our eyes to other means of learning than only the traditional methods.

**4.3.2 Skills and experiential learning**

Several scholars have especially focused on the combination of learning and experience and even argued that experience is the most essential input for learning. Others have equated experience with learning and argued that learning is nothing more than just
having experience. David Kolb became famous for his Experiential Learning Cycle. The first draft of this cycle was published in 1975 in an article together with Ronald E. Fry (Kolb & Fry, 1975). In 1984 Kolb wrote his book “Experiential Learning: Experience as the Source of Learning and Development,” which states: “People do learn from experience and the results of that learning can be reliably assessed and certified for college credit” (p. 3). With this sentence Kolb, has set the agenda for his book. He finds that lifelong learning is the challenge of all people in modern society. Learning should no longer be regarded as something you do in schools only, but something that goes on in daily life for all people. Learning takes place in schools, at workplaces, and in daily life as Figure 4.4 shows. Learning from experience is the process that links education, work, and personal development. In a way Kolb’s ideas do indeed reflect parts of Illeris’ ideas: learning as a way of interaction with our environment, in specific situations and in relation to others. Thus, the wider aspects of learning are present in both authors’ views on learning.

![Figure 4.4: Experiential learning as the process that links education, work, and personal development (Kolb, 1984, p. 4)](image)

The figure pictures the workplace as a learning environment that can enhance and supplement formal education and can foster personal development through meaningful work and career-development opportunities. It also points out the importance of formal learning and personal development in lifelong learning. It shows that Kolb argues that experiential learning revolves around three elements and that combine to make up experiential learning. Educators have tried to get practice into classrooms to make the teaching more real. Methods include apprenticeships, internships, work/study programs, cooperative education, studio arts, laboratory studies, and field projects. In all these
methods, learning is experiential, in the sense that the learner is directly in touch with the realities being studied (Kolb, 1984, p. 5).

There are three well known scholars who have contributed to experiential learning theory and inspired Kolb: John Dewey (1859-1952), Kurt Lewin (1890-1947), and Jean Piaget (1896-1980). Please see Figure 4.5. The figure gives a comprehensive view of the three traditions of experiential learning.

Figure 4.5: Three traditions of experiential learning (Kolb, 1984, p. 17).

The lower portion of the figure shows how much contemporary applications owe to experiential learning, and not only in education. Educators try to get as close to practice as possible – for instance by introducing on-the-job training/learning. This might increase motivation as well. To favor experiential learning curricula, they can be designed for more practical teaching methods. Dewey, Lewin, and Piaget have supplied a range of teaching methods that get close to learning by experience. Therefore, Kolb has suggested the term “Experiential Learning.” In this method experience plays an important role.
Rationalist and other cognitive theories of learning tend to give primary emphasis to acquisition, manipulation, and recall of abstract symbols, and behavioral learning theories deny any role for consciousness and subjective experience in the learning process. Experiential learning, on the other hand, suggests a holistic integrative perspective on learning that combines experience, perception, cognition, and behavior (Kolb, 1984, p. 21). David Kolb integrated the theories of Lewin, Dewey, and Piaget in his own theory of learning, which became an important theory of experiential learning – most concretely expressed in his learning cycle. Kolb (1984, p. 21) explains how learning in Lewin’s action research and the laboratory method are facilitated by an integrated process that begins with here-and-now experience followed by collection of data and observations about that experience. The data are then analyzed and the conclusions of this analysis are fed back to the actors in the experience for their use in the modification of their behavior and choice of new experiences. The learning is thus conceived as a four-stage cycle, as shown in Figure 4.6.

![Figure 4.6: Experiential learning cycle (Kolb & Fry, 1975)](image)

Immediate concrete experience is the basis for observation and reflection. These observations are assimilated into a “theory” from which new implications for action can be deduced. These implications or hypotheses then serve as guides in action to create new experiences.

According to the model – and Lewin’s research – people in action groups use their here-and-now concrete experience to validate and test abstract concepts. People give personal
meaning to abstract concepts and share it with other people in the group. Other group members can then share the interpretation in its concrete or abstract form. There is feedback in the process as the “forming of abstract concepts and generalizations” is “tested in new situations” giving new “concrete experiences.” If there is a gap between “obtained” experience and “expected” experience based on conceptualization, the decision process can be corrected based on this new experience. Adult education programs under the name “Merkonom” were introduced in the 1960s at business colleges in Denmark based on this principle of learning. The author of this dissertation has lectured for many years in those evening courses and experienced productive discussions in class among participants and between participant(s) and lecturer. Participants (students) had their own experiences from their own companies in their own industries that could be discussed with fellow participants to facilitate learning.

In Kolb’s opinion, learning is best understood as a process whereby concepts are derived from and continuously modified by experience. No two thoughts are ever the same, since experience always intervenes. Learning is an emergent process whose outcomes represent only historical record, not knowledge of the future (Kolb, 1984, p. 26). It is of course interesting to put the experiences, as described by Kolb in his experiential learning cycle, into a lifelong perspective – observation and reflection in a career perspective. Learning is a continuous, lifelong process providing conceptual bridges across life situations such as school and work. Learning can be seen as a transaction process between the individual in need of learning and the providing individual. It appears that active students will learn more than passive students, because they test their experience and assumptions, and they are corrected or they grow to a higher order of knowledge. Knowledge then becomes the result of the transaction between social knowledge and personal knowledge. Dewey called social knowledge the civilized objective accumulation of previous human cultural experience, whereas personal knowledge he described as the accumulation of the individual person’s subjective life experiences. Knowledge results from the transaction between these objective and subjective experiences in a process called learning (Kolb, 1984, p. 37). Kolb stretches the bow heavily by saying that “Learning is the process whereby knowledge is created through the transformation of experience.” (Kolb, 1984, p. 38).

What is special about experiential learning? It is recognized that a human being has five senses and we even talk about a sixth sense when we feel a hint of something. This might
be an interpretation of combination of senses that comes with experience? Table 4.2 contrasts the use of our senses in academic and practical learning.

Table 4.2: Some examples of learning from using one’s senses in the business administration area

<table>
<thead>
<tr>
<th>Sense</th>
<th>How do you learn from it?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Academic</td>
</tr>
<tr>
<td>Seeing</td>
<td>Reading, videos, TV, Internet, meeting peers.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing</td>
<td>Lectures, radio, TV, meeting peers.</td>
</tr>
<tr>
<td>Feeling</td>
<td></td>
</tr>
<tr>
<td>Smelling</td>
<td></td>
</tr>
<tr>
<td>Tasting</td>
<td></td>
</tr>
</tbody>
</table>

The table shows that, in business administration, practical learning typically uses more senses than academic learning. It is claimed that in many cases we have forgotten most of our senses when we communicate with each other or with clients or customers. Regarding his motivation for his book “Brand Sense,” Martin Lindström writes:

“Did you know that currently 83% of all commercial communication appeals only to one sense – our eyes? That leaves a paltry 17% to cater for the other four senses. This is extraordinary given that 75% of our day-to-day emotions are influenced by what we smell, and the fact that there’s a 65% chance of a mood change when exposed to a positive sound. This is a long way of saying that the importance of our senses has been completely overlooked in the brand-building business... until now” (Lindström, 2008).

There is no doubt that individuals get a more holistic perception from an experience when several senses are activated, and this happens more frequently in practice than in academia. Confucius, circa 450 BC, understood the importance of experiential learning in his expression: “Tell me, and I will forget; show me, and I will remember; involve me,
and I will understand” (Ryerson University, 2008). Gardner’s (1983) theory of multiple intelligences seems to address the variety in peoples’ sensations and how they learn from them. Perhaps companies should try harder to recruit candidates with each of these qualities, as different job functions might appeal to people with different types of intelligence.

From the concrete experience in Kolb’s learning cycle, the next step will be observation and reflection. An individual will think about the outcome of an action. Reflection can be defined as “the process of stepping back from an experience to ponder, carefully and persistently, its meaning to the self through the development of inferences.” (Daudelin, 1996).

Seibert (1999) distinguishes between “coached reflection” and “unstructured reflection.” Coached reflection involves providing learners with formal tools to help them think through an experience in order to identify what they learned from it. The reflection usually happens after the experience. Unstructured reflection is reflection that managers naturally engage in while confronting challenging experiences. They are in the midst of experiencing it and it involves spontaneous mental engagement with a situation. Seibert finds unstructured reflection especially important for learning. It involves “on-the-spot surfacing, criticizing, restructuring, and testing of intuitive understandings of experiences” (Seibert, 1999, p. 55). There are five conditions in a work environment that enhance reflection: autonomy, feedback, interactions with other people, pressure, and momentary solitude – conditions that often are present in practice and that can be managed in a constructive way. For maximum experiential learning to take place, a manager should be aware of these conditions and use them proactively to enhance unstructured reflection and better spur-of-the-moment decision-making (Seibert, 1999, p. 58).

According to Illeris (2007, p. 66), the concept of reflection has become a keyword in the present debate on pedagogic and learning theory, because what is learned in school should to a great extent be applicable in practice, and here reflection is regarded as playing an important role. In curriculum development education programs should, therefore, favor learning methods that stress reflections by students. David Boud et al. (1985) talk about “reflective practice” as a process where action, experience and reflection more or less flow together. Robinson and Wick (1992) also found reflection important for experiential
learning. They found that three basic elements should be present in learning-from-experience:

1. Prior to the experience, the individual needs help in planning how to approach the experience in order to gain the most from it.
2. During the experience, an “action learning” process should be employed that involves alternating periods of action and reflection.
3. After the experience, the person needs a structured opportunity to reflect more deeply on the experience in order to extract the maximum learning from it.

They stress that experience only provides the opportunity for development to take place and that the individual must extract the lessons from the experience before development can occur. Hall (1995) found that the two most important steps in utilizing experiential learning are 1) recognizing the need to do so, and 2) consciously focusing on the task. Building these steps into the strategies of the firm can best do this.

Reflection is also vital in biographicity (Alheit, 1999) where you reflect on your own life, and try to learn from experience and use your learning to frame your future. A person is influenced by the content, incentive, and interaction dimensions of the Illeris learning model. What he has learned in the past are building blocks for his future, but he must have incentives for accepting new propositions, and the interaction with the environment must suit his content and incentives. In life situations where transformative learning occurs, people have the chance to be entrepreneurial, because environmental influences force them to change the way they think and maybe their whole attitude to life, and to build up new routines. They can be seen as either positive or negative, and the evaluation can change over time. For instance, some have the opinion that forced pension ages in certain professions are too early for the people of today. Their health conditions are constantly improving and they have better general health. The situation can trigger the wish to embark on a new career in a new profession without these strict pension rules, and the forced transformative learning can be perceived as a gift – maybe only after some years – even if the transition was not voluntarily.

Boud and Walker (1993, p. 75) write, “Reflection happens in the midst of action, not only in the calm light of recollection at leisure!” They think that the surprise of meeting the unexpected, the change of direction required by confronting difficulties, and the importance of advance preparation to help address at least some of the challenges which may arise are important for decision-making and learning. They make a re-evaluation of experience in this sequence (Boud & Walker, 1993, p. 75):
- Association: Linking of experience elements from past experience.
- Integration: Integrating the new experience with existing learning.
- Validation: Testing experience in some way.
- Appropriation: Making the experience one’s own.

In other words, successful reflection demands noticing, intent, and intervention to create experiential learning. Schön (1987, p. xi) talks about “Reflexion-in-action” (the “thinking what they are doing while they are doing it.”) It seems clear that there is a time dimension in reflection. Reflection over a life course has more retrospective qualities. We act forward but understand backward, as the Danish philosopher Søren Kirkegaard said. In hindsight many things get clearer and we reflect on the past often to get guidance for the future.

The fact is, however, that in everyday life we hopefully live in harmony and take life more or less as granted. We do not reflect so much actively. But if something disrupts our harmony we have to reflect and make decisions. Jarvis talks about “disjuncture” in these situations, and he explains it by saying:

“Disjuncture, itself, is a complicated phenomenon as we have demonstrated previously, but briefly it is the gap that occurs between our experience of a situation and our biography which provides us with the knowledge and skill that enable us to act meaningfully. When this gap occurs, we are not able to cope with the experience we have without learning something new” (Jarvis, 2007, p. 98).

In learning theory, reflection is a vital concept. It is part of thinking and most authors incorporate reflection into their models. Apparently, people reflect to different degrees dependent on the situation. Busy managers have to make decisions often in seconds which does not leave much time for reflection. On the other hand they are in an action learning setting where often important problems have to be solved and according to action learning theory this should promote learning. Some managers build in periods in their busy calendar for reflection. They plot in dummy meetings meant for them to be alone for reflection. In some countries there are refugia where people can stay for reflection over some days or more. Usually there is neither radio nor television nor other disturbing elements in the rooms. Copenhagen Business School has bought a house in an isolated place at Skagen, Denmark, for its professors to retreat for periods of reflection. One guest professor at USBE, Dr. Foo Check Teck, in 2006 claimed that the Nordic countries were
better innovators than the Chinese because of a calmer environment that gave more time for reflection. As scholars point out, reflection also demands will power to be of value in a learning context. For mature people, reflection plays an important part in being wise as they have accumulated experience that they can put into perspective. Sometimes things give more meaning when seen retrospectively. The problem in this context is, however, that environmental factors change so rapidly that previous experience can be outdated and not be of much help in new contexts.

In schools, disjuncture situations must be common. We might learn subjects where we have very little experience and we try to adopt abstract model thinking into our “biography.” But what do we do when our “biography” is empty or nearly empty? When we do not have good foundation? The same will happen by learning from practice, but there is usually a context so that the disjuncture will not be so big. In practice, theoretical principles get “dressed” and we understand them better. Similar ideas are expressed by Nielsen and Kvale (1999) in their book on “Master Learning” (Mesterläre) in which they show that Master Learning (apprenticeships) is valuable to reduce the practice shock which is common in the transition from education to work.

Illeris (2007, p. 232) praises learning methods in which part of the learning takes place in the workplace. He praises training programs that alternate between theory and practice as excellent learning methods. Illeris 2007, p. 229 regards net-based learning as a feasible learning method but sees problems of motivation by the participants working in the solitude of home. He points out research showing that the best result of net-based learning is to supplement it with direct meetings as much as possible. He is also aware of the lack of workplaces for trainees in spite of the “cheap labor” that they are normally regarded to be. The reason is that companies often feel disturbed by trainees when they have to instruct them.

But how do educators build student experience into education programs? Using again the three dimensions of learning (Illeris, 2007) – content, incentive, and interaction – it is clear that experiential learning includes them all. A life event happens in interaction with others and is motivated by internal or external stimuli and gives you content (knowledge) – in other words, an experience. “Traditional syllabus learning is predominantly related to or aimed at the content dimension, whereas important life learning includes significant learning in all three learning dimensions” (Illeris 2007a, p. 92). He points out, however, that school learning also involves all the three dimensions of learning. Motivations and
emotions are involved in school learning as is interaction, but often in a very limited and unbalanced way. Illeris therefore comes up with his definition of experiential learning:

“Experiential learning can be understood as learning in which the learning dimensions of content, incentive, and interaction are involved in a subjectively balanced and substantial way” (Illeris, 2007a, p. 92).

Illeris is satisfied with his definition in spite of the rather imprecise formulation of especially “subjectively balanced” and “substantial.” He thinks that subjectivity and experience are related – the more subjective it is, the more experience is involved. For the “substantial” dimension he establishes a rule of thumb, stating: “The more complex the type of individual acquisition is, the more likely it is that the learning could be characterized as experiential” (Illeris, 2007a, p. 93). The word “subjectively” in Illeris’ definition is important, as it is the individual who has his own experience. However, the time dimension is important too, as the individual gets his experiences at a specific moment, but all these moments are added through life, and we can talk about lifelong experiences and thereby lifelong learning. Experiential learning is best evaluated over a lifelong career. Here the individual can look back and have a holistic view of his life. At this stage of life he usually has serenity and is sincere and honest about his life. He has life wisdom. Illeris (2007, p. 250) regards wisdom as a form of accumulation of learning throughout life that can be regarded by others as a practical thing for them to consult instead of expert knowledge in a given situation. He refers to the renewed interest in experiential learning methodologies in at least the last two decades. He speaks about adult education where the concept is related to the recognition and application of students’ prior informal learning and about workplace learning as learning by doing instead of learning by courses and studies. He perceives that experiential learning is in a form of opposition to “school learning” or learning from being taught in an institutional setting. Illeris’ definition of experiential learning puts more attention on the social factor of learning than Kolb’s, which has a more rigid form in his experiential learning cycle.

Argyris (1991) has researched highly skilled professionals and their ability to learn, and he found that they are extremely good at single-loop learning, but not so good at double-loop learning. He found that the motivation to learn is important, but not enough. You must have a mindset that enhances double-loop learning. Argyris thinks that companies can learn how to resolve this learning dilemma by teaching employees how to use reason for their behavior in more effective ways to break down the defenses that block learning.
One of the ways he describes is the acceptance of failures in order to learn from them. This really links to the ideas of entrepreneurial behavior, as it is often said that entrepreneurs are good at learning from their mistakes.

Larsen (2004) is rather concrete in his explanations of experiential learning. He defines experiential learning as “a common denominator for any type of learning process based on human action involved in performing tasks (typically, but not exclusively) in a work organization, rather than by being enrolled in formal training programs” (p. 491). He structures experiential learning in the following methods:

- Job assignments
- Moves between jobs
- Failures and traumatic situations
- Taking risks
- Careers as an experiential learning voyage

Larsen’s experiential learning methods will be further elaborated as they might be possible to assess in a quantitative way over a lifelong career. Later in this study assessment models will be proposed, and for assessing a candidate for a job, the following indicators of learning and competence are crucial:

1. **Job assignments** give the person a continuous influence and learning by doing possibility. “Job experience often overshadows learning outcomes from training courses” (Mirvis & Hall, 1996, p. 84). In a practical setting the person can (and often will) repeat job tasks whereby learning is facilitated. It also appeals to more senses than in a training situation – most notably the motor sense that is activated when you do the work yourself. These qualities are also the main motivations for offering apprentice educations. The apprentice learns by doing – often by prior instructions from a professional master.

2. **Moves between jobs**. A change of job is usually challenging for the person. Even if the job content is nearly identical, location and other environmental factors differ. The person is normally motivated (positively or negatively) and shall try to master new things. This enhances learning, and experience from former jobs can be used in the new job. Job rotation has been widely used in the Danish public administration with the aim of challenging and motivating people and making
them more innovative for the benefit of themselves and their job tasks. The public service should, thereby, be improved.

3. Failures and traumatic situations. Literature is full of examples of people praising failures as sources of new successes. Some organizations pride themselves on a culture of “innovation by failure.” Ester Dyson (Voices, 2002) promotes risk taking and experimentalism in her company. She feels no shame in making mistakes as long as you learn from them: “Everything I’ve learned, I’ve learned by making mistakes.”

4. Taking risks. Larsen (2004) considers the potential risk of failing to be an inherent, valuable part of the learning process. Risk makes you alert and apt at learning. Michael Dell (Voices, 2002) thinks that innovation is about taking risks and learning from failure. Betty Cohen (Voices, 2002) thinks on the other hand that the “dangerous brew of fear and complacency” makes you stay where you are out of fear of failing or blowing too much money or placing the wrong bets.

5. Careers as an experiential learning voyage. There is an interaction and interdependence between the individual and the organization, and a career can be seen as a learning voyage. Being promoted in the organization, changing jobs, participating in professional networks, being outposted to foreign cultures – all adds to your experience and learning. These aspects of experiential learning as Larsen shows do indeed have much in common with the skills and competences of entrepreneurs, as has been discussed at the beginning of this chapter. Entrepreneurs are people who like to implement things and who have a good eye for what is practical, and this is often reflected in the way they learn.

Larsen’s (2004) very concrete perception of how experiential learning takes place in business is refreshing compared to Kolb’s more theoretical model of the experiential learning cycle. To try to make Kolb more concrete, the author has contrasted the traditional business planning model with Kolb’s learning cycle in Table 4.3. Looking at his four-stage cycle and comparing it to the business planning model with its planning cycle (analysis-planning-implementation-control) shows a strong resemblance. Based on the information above, Table 4.3 can be constructed.
Table 4.3: Business planning and experiential learning cycle

<table>
<thead>
<tr>
<th></th>
<th>Kolb’s experiential learning cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Forming abstract concepts (3)</td>
</tr>
<tr>
<td>Planning</td>
<td>Testing in new situations (4)</td>
</tr>
<tr>
<td>Implementation</td>
<td>Concrete experience (1)</td>
</tr>
<tr>
<td>Control</td>
<td>Observation and reflection (2)</td>
</tr>
</tbody>
</table>

The difference is semantic, but the four-step experiential learning model focuses on experiencing. Both models can, however, start at whatever stage and can have iterative nature and feedback to earlier stages. Nevertheless it seems like the experiential four-stage model addresses even today’s chaotic environment, in which planning is difficult, and where managers must act on present experience and reflect on it without much formal analysis in common business sense. “It is no longer possible for organizations to plan for change in a proactive sense; rather, it has become necessary for organizations to respond and adapt to change spontaneously, after the fact” (Romaniuk & Snart, 2000, p. 318). When using the planning model we are apparently implicitly going through Kolb’s experiential learning cycle, but the time dimension has shrunk.

From an educational perspective, Gibb (2002, p. 247) has tried to come up with a number of entrepreneurial capacities, which provide the focus for curriculum development. He found these capacities to include: manage the entrepreneurial life world; design and cope with entrepreneurial governance systems (the ethical and moral dimension); develop global sensitivity in the organization; design and develop entrepreneurial organizations; design, introduce and manage business development processes; actively pursue stakeholder relationship management learning; pursue flexible strategic orientation; develop personal enterprising capacities; pursue entrepreneurial learning; and personalize global information sources. Gibb tries to get real life situations into the lecture room by suggesting real decision situations often handled by entrepreneurs – although it is still not the real world.

There is a saying that necessity force people to act. It can be interpreted as an alert awareness of one’s situation and a forced position on an issue that force one to act. In a way it can be claimed that Kolb’s four phases in his learning cycle become very real. If it is possible to enhance awareness of the learning cycle in decision-making, decisions should be better because they are more considered. It would be valid both in classrooms and in practice. A method could be “action learning.” Revans has been called the father of “action learning” which is a form of experiential learning. “Action learning is a social
process, in which managers learn with and from each other by supportive attacks upon real and menacing problems” (Revans, 1977, p. 3). It is seen that problems should be real and menacing as the motivation to solve the problems are biggest in such cases. According to Revans, managers learn by attacking real and difficult problems in an atmosphere of supportive humility. Revans thereby seems to be more radical in his suggestion that decision makers should feel a sense of urgency before they really learn. It can, however, be possible in an educational context to utilize Revans’ thinking. Also Pittaway and Cope (2007) have tried to integrate experiential and collaborative approaches to learning. They used Kolb’s learning cycles and Revans’ action learning model as models for simulating entrepreneurial learning. One of the approaches was for students to make a business plan. In Table 4.4 it is shown how Kolb’s (1984) experiential learning theory and Revans’ (1977, 1985) action learning fit into a typical learning situation in entrepreneurship teaching, where you often ask students to make a business plan for their own business idea. In this way Kolb’s and Revans’ theories are brought into the classroom.

Table 4.4: Learning theory and students’ experiences for a business plan assignment

<table>
<thead>
<tr>
<th>Learning theory</th>
<th>Students’ experience:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kolb’s experiential learning cycle:</strong></td>
<td></td>
</tr>
<tr>
<td>• Concrete experience (CE)</td>
<td>The experience of doing something. Market research on their business concept. Students learn about market research by doing it.</td>
</tr>
<tr>
<td>• Abstract conceptualization (AC)</td>
<td>Grasping experience that uses knowledge abstracted from its context via theory or concepts. Lectures providing conceptual input.</td>
</tr>
<tr>
<td>• Reflective observation (RO)</td>
<td>Students through action and questioning reflect on and transform their understanding.</td>
</tr>
<tr>
<td>• Active experimentation (AE)</td>
<td>Students are engaged in new experiences.</td>
</tr>
<tr>
<td><strong>Revans’ action learning:</strong></td>
<td></td>
</tr>
<tr>
<td>• Questioning insight (QI)</td>
<td>Engagement with practitioners who have concrete experience in creating or assessing venture plans.</td>
</tr>
<tr>
<td>• Programmed knowledge (PK)</td>
<td>The individual’s taken-for-granted knowledge.</td>
</tr>
</tbody>
</table>

Source: Adapted from Pittaway and Cope (2007)
It appears from Table 4.4 that, for students, making a business plan for their own business idea is close to actual practice without really being there. It is a school assignment that reflects a real situation, but it is not perfectly real, because students do not have to implement the business plan and thereby do not take any risks. It is a paper plan. Nevertheless a business plan assignment is regarded as one of the closest ways to represent a situation from practical business life. Since such assignments are often made in teams, the social aspect is brought in too. Business plan construction in a school context honors Kolb’s experiential learning cycle and Revans’ action learning principles quite well, but it is still a surrogate for real experience.

In company-based action learning projects, people individually or in teams work on issues of strategic importance within their corporation. The projects are analyzed and given perspectives through a reflective process. In this way the people involved and the organization as a whole are developed and real decisions are made. The decisions meet reality and the individual or team can reflect on possible deviations. The action learning process is illustrated in Figure 4.7.

![Figure 4.7: The action learning process](Source: Larsen (2004, p. 15))

Through action learning processes, not only do individuals develop their decision-making skills but also the teams and the organization as a whole. The philosophy behind action learning is that people learn best by experiencing actual situations as opposed to reading about what others did or might do. “Action learning is not theory, but theory in action” (Isabella, 2006, p. 202). Here we can see the value of managers having a high degree of theoretical learning, because they have a framework to solve real situations, working with real people and real issues. Action learning put into management education in the form of role-plays, in-class exercises, retrospectives or self-narratives, reflective exercises or
activities, individual practicums, or internships will have a high potential degree of impact on learners, as will team-based activities such as behavioral simulations, computer-based simulations, company projects, and consultancy projects (Isbella, 2006, p. 204). Management training courses should include action learning methods to a great extent, but often they are not seen, because acceptance of companies to “deliver” issues for students often is not there, so universities have to fall back on case studies as one of the means that gets closest to real life situations. But imagine medical doctors without training on authentic body material and without supervision from an experienced doctor during, for instance, surgery. Or imagine a pilot without many hours of training in a flight simulator. In a study of export behavior of small and medium sized companies (SMEs) Tesar and Moini (1998) found that the behavior of the SMEs after participation in delegation travels arranged by export promotion authorities improved remarkably. Many of the mental barriers for foreign engagements were lowered by these delegation travels.

The theory of Sara Sarasvathy (2001), who talks about causation logic and effectuation logic, is fruitful to look at from an experiential learning context. She has studied how entrepreneurs make decisions in the entrepreneurial process. She found that they make decisions based on “Who am I”; “Which competences have I?,” and “Who do I know” much more than they do based on objectives set up in a business plan. The business plan framework is very much a causation logic way of attacking challenges, whereas the more mundane approach based on factual status of the entrepreneur is what she calls effectuation logic. It must be much more motivating to go from where you are and what you have than to base entrepreneurship on the wishful thinking of a business plan. Then you can let experiences and reflections form new abstract ideas to try, as the Kolb learning cycle prescribes.

Summarizing, experiential learning has something to do with action – to get an experience from doing. It is often connected to performing in practice, but is not limited to that. Action learning is a form of forced learning where the participants solve problems that are important for them. They do this in an active way and put volition into the decision process. They go through the three phases in Kolb’s learning cycle – experience, observation and reflection – and abstract conceptualization before they test their new solution in practice. In school situations, solutions are normally not implemented as decision situations come up in case studies or other school assignments. They become less credible as there are no risks involved, whereas there will always be risks in practice.
Although Kolb’s learning cycle is widely appreciated, there has also been criticism in the literature. Some of that criticism will be discussed here. A difficulty with assessing experience is that an experienced person has not necessarily learned the right thing in relation to being competent. The Kolb experiential learning definition “transforms experience to knowledge” which implicitly means that Kolb himself sees a difference between experience and knowledge. It is usually easy to quantify experience, for instance by number of the years a person has worked in a profession, but his learning is more difficult to quantify. Experience is an input and learning an output (Michelson, 1996).

In his book from 1984 Kolb has integrated the thinking of Lewin, Dewey, and Piaget. From Lewin he adopted his experiences with training groups (T-groups) and laboratory research. From Dewey he adopted his theory of learning as continuity and interaction of concrete experience building on previous learning. From Piaget he got the stage theory – the characteristic learning patterns in the four main stages from newborn to adult. From these three scholars, Kolb developed his learning cycle, as he felt that they all talked about the same processes but from different perspectives. It can be questioned, however, if these perspectives are commensurate (Illeris, 2007). Illeris (2007, p. 55) criticizes Kolb for not paying enough attention to the social element of learning. He thinks that Kolb is one-sided, looking at the individual perspective and not the social. He criticizes Kolb for being too schematic, and because his very stringent and logical systematism may be difficult to recognize in practice. He refers to Donald Schön (1931-1997), “who has studied how ‘reflective practitioners’ cope with different situations by drawing on, and combing in parallel, the relevant elements that they have at their disposal.” (p. 55). Illeris regards Kolb’s learning cycle as an illustration of a typical sequence only, as the brain’s flexible mode of operation conflicts with Kolb’s very rigid model (p. 156).

Kolb does, however, also reflect on the distinction between personal and social knowledge (p. 109). He regards the apprehension dimension as a very personal thing where individuals apprehend differently depending on their predispositions. He regards learning as an individual thing that happens in a social context and that saves us from being copies of others. He also seems to oppose the increasing use of computer systems to manage our lives, as software programs only can manage the commands they are programmed to do and individuals often will not fit into standard cases. Assessment and judgment by human beings are still important in cases in social systems. This should be kept in mind later when assessment systems are developed for assessing experiential learning of adults. The concept of reflection is vital in Kolb’s learning theory. There can,
however, be different degrees of reflection. Brookfield (1987) concludes that critical reflection that is different from reflection in general and should (1) challenge assumptions; (2) challenging the meaning and the context; (3) try to use one’s imagination and explore other possibilities; and (4) through these notions and explorations, lead to reflective skepticism.

The theory of reflection is comprehensively covered in Section 4.2, where shorter cycles than Kolb’s four-step cycle have been described. Depending on the person, the context, and the time available for decision, each of Kolb’s steps can take a long time or a short time, but in principle his theory seems plausible. Maybe his four-step model can be likened to a four-stroke engine where the process (all four strokes) can happen incredibly fast, but the process is still based on all four strokes. Maybe learning works the same way, but as in a four-stroke engine the process can be facilitated and enhanced by good petrol as learning can by incentives and social interaction. Jarvis (1987) found Kolb’s model important but maybe too simple. He therefore asked a sample of course participants to describe how they learned and he formed the learning model described in Figure 4.8.

![Figure 4.8: Jarvis' learning model (Jarvis, 1987, p. 25)](image)

Looking at Figure 4.8, Kolb’s learning cycle clearly manifests itself, for instance in “experience,” “reasoning and reflecting,” and “practice experimentation.” The model gives, however, more possibilities to follow other (shorter or longer) tracks than in Kolb’s more rigid model. One track to follow is for instance the horizontal path at the upper end
of the figure where the person comes out of his experience “reinforced but relatively unchanged,” which pretty much relates to daily life situations.

Concluding the critique from literature of Kolb’s learning cycle, it is accused of being too idealized, as learning in practice can describe shorter or longer cycles (Jarvis) and is more dependent on the social context in which learning takes place (Illeris). Illeris also find Kolb’s model too rigid, as the human brain is more flexible in the way it learns.

What happens when we do not learn or we learn something unintended or wrong? Illeris (2007) points out that there are barriers to learning. The causes for this can be found in all three of his dimensions of learning: content, incentive, and interaction. They can be grouped into three cases: mislearning, defense against learning, and resistance to learning. Mislearning can be caused by lack of qualifications, lack of concentration, and misunderstanding. Defense against learning can be a very practical thing in an overcommunicated society. We have to be selective in what we learn. In principle our learning opportunities are endless. Resistance to learning is our obstruction to learning something in situations that are experienced as unacceptable. Illeris (2007, p.90) asks what happens when somebody in a learning situation does not learn anything or learns something that is insufficient or quite different from what is intended. He states that there are almost an unlimited number of individual and situational reasons for non-learning. Learning processes are blocked or derailed, partially or totally. He uses his framework of content, incentive, and interaction to describe some situations.

In the content dimension it is about the impulse or message that does not come through correctly, resulting in erroneous learning or non-learning. The reason for this may be, for instance, a lack of involvement or concentration, a lack of necessary prior learning to understand the message, or inadequate communication or teaching. The learner does not acquire what he wants or is supposed to learn. The barriers to learning may also be rooted mainly in the incentive dimension, typically resulting in a kind of mental defense. It can be a defense against the overload of information that most people feel from time to time. The defense mechanism tries to maintain the individual’s mental balance. It can also show up as an identity defense where the individual is exposed to changes in life conditions. Non-learning can also be rooted in the interaction dimension. The learner is in a state of mental resistance – active non-acceptance and objection. This state can by third parties be regarded as annoying, but it can also result in acceptance of new standpoints and lead to new developments. Boud and Walker (1993) look at barriers as the factors which inhibit
or block learners’ preparedness for the experience and their active engagement in it. It hinders their ability to reflect rationally on it with a view to learning from it.

From this discussion it can be seen that for people to learn what is intended by those who teach them is a much idealized phenomenon. People who learn should be in a receptive mode that is very sensible to the state of mind of the learner, the social context he goes into, and the learning situation in which he is placed.

4.3.3 Personality

The third dimension in competence – personality – covers attitude, behavior, and character. Systematic examination of the concept of personality is important. For example, the Oxford Dictionary of English (2003) defines these three constructs like this:

*Attitude:* A settled way of thinking or feeling about something
*Behavior:* The way in which one acts or conducts oneself, especially towards others
*Character:* The mental and moral qualities distinctive to an individual

There is an intercorrelation between them as attitudes often lead to behavior and behavior often forms one’s character (Evan-Jones, 2004). Sometimes people have attitudes towards something, but behave inconsistent with their attitudes (Baron, Byrne, & Branscombe, 2006). This can happen in cases where they want to please a colleague or are facing external pressure, for instance in job recruitment situations where applicants adapt to what they regard to be the employers’ attitudes. In the long run it must be difficult to behave in contrast to one’s attitudes. Therefore there should be a match between organizational values and one’s personal values (Lock & Hogan, 2000). Measures of personality are not designed to tell if a person is good at performing a job, but rather to tell about how he will interact in the workplace, if he is motivated to do a good job, and how well he will get along with others (personal fit). This can be assessed by using well developed measures of normal personality (Lock & Hogan, 2000).

Epstein and Hundert (2002) write that neurobiological research indicates that emotions are central to all judgment and decision-making. The degree to which a person is attentive, curious, self-aware, and willing to recognize and correct errors reflects his habit of mind (Epstein & Hundert, 2002). This could be a definition of “character.” Björnåvold (2001) writes about the Mercedes Benz recruitment case mentioned earlier, where the
enterprise should develop a recruitment process “from scratch” to find “generalists able to learn.” “The assessment was thus focused on attitudes, abilities to communicate, approaches to problems rather than predefined, non-disputable areas of knowledge. The case also illustrates that there is a limit to the degree of simplification and standardization introduced in assessment methodologies” (p. 79).

Personality is so multifaceted that it is difficult – and maybe also unnecessary to describe – because in a recruitment situation it is to a great extent a question of fit between the candidate and the people of the hiring organization. There should be fit in all three personality characteristics – attitude, behavior and character – and ultimately, this has to be assessed by personal contact face to face. Personality tests can, however, put candidates into typologies, but it is hardly enough for recruiting the right person. Please see for instance Table 4.5 (Five minds for the future) and Table 4.6 (Indicators for some key competences) where assessment formats for typologies are presented. As mentioned earlier, these typologies are especially good at assessing the fit between job and candidate, but not if the person is motivated to do a good job and will perform well. Here a personal interview will be necessary between hirer and candidate to disclose these things. The personality dimensions will not be further described here, but will be treated in more detail in Chapter 4.5 in connection with constructing assessment models of personality.

As can be seen so far, most research on learning and experiential learning deals with shorter learning cycles and does not look at learning in relation to lifelong careers. Therefore, the next section will be devoted to lifelong careers and lifelong learning.

4.4. Lifelong careers and lifelong learning

The main interest of this research is lifelong careers and assessment of experience during those careers; experiential learning in a lifelong learning context. Having more knowledge about learning incidences makes it easier to construct assessment models and tools for assessing candidates for jobs – maybe quite different jobs than they use to have. Some additional theories about learning in a lifelong context will be presented here. In a lifelong career, experiential learning becomes more important, as school learning is typical left behind to an even greater extent. It is common to assess the single learning occasion, for instance in school exams, where an oral or written examination is performed and the outcome graded. It is something else to assess the outcome of a whole career. A career is,
so to say, an experiential learning voyage that deserves its own assessment, as the sum of the whole is greater than the sum of the bits. The whole learning exceeds then the bits of learning because there is synergy in learning and because the blending of the learned bits is as important as the bits themselves.

During a career much learning takes place and the learner becomes skilful and, hopefully, eventually competent (Teunissen & Dornan, 2008). The way a person acquires skills can be demonstrated in the learning cycle, as shown in Figure 4.9.

![Figure 4.9: Stages in acquiring skills](image)

Source: Lake and Hamdorf (2004, p. 327)

In academic education a learner takes the journey from unconsciously incompetent to consciously incompetent. He knows he cannot do it. Through the curriculum and classes he attends he becomes aware of his incompetence. Learning through the course should give him knowledge to be consciously competent. He knows what he knows. He can explain the theory and maybe perform with great thought (consciously competent). Only with practice and repeating the tasks will he be able to practice satisfactory in a variety of situations (unconsciously competent) (Lake & Hamdorf, 2004, p. 328). This learning cycle can function on ad hoc learning, but cast light on the value of lifelong learning too.
In many instances a mature person is unconsciously competent, but has difficulty in expressing his competence in, for instance, an assessment situation for a new job.

Learning can happen in many spaces, situations, and contexts as we learn all the time (Boström, 2003). For assessing learning through a career it is interesting to look especially at lifelong learning. But what characterizes lifelong learning in contrast to just learning?

Jarvis defines learning as:

“The combination of processes whereby the whole person – body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, beliefs and senses) – experiences a social situation, the perceived content of which is then transformed cognitively, emotively or practically (or through any combination) and integrated into the person’s individual biography resulting in a changed (or more experienced) person.” (Jarvis, 2007, p. xi).

He defines lifelong learning as:

“The combination of processes throughout a lifetime whereby the whole person – body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, beliefs and senses) – experiences social situations, the perceived content of which is then transformed cognitively, emotively or practically (or through any combination) and integrated into the individual person’s biography resulting in a continually changing (or more experienced) person.” (Jarvis, 2007, p. 1).

As is seen in the two definitions, the only difference is the second definition’s attention to learning through life: “throughout a lifetime” and later on a “continually” changing person as learning goes on all the time for a living soul. Interesting in the Jarvis definitions is the attention to both body and mind and to learning as a social phenomenon. It is also worth noticing that learning is more than cognitive processes – it is also emotional and practical. Jarvis (2007) uses the word “sensation.” In the Shorter Oxford English Dictionary (2002), sensation is defined as “the consciousness of perceiving or seeming to perceive some state or condition of one’s body or its parts or of the senses; an
instance of such consciousness; (a) perception by the senses, (b) physical feeling.” From this it can be argued that people especially feel sensations in practice where they encounter real things and not abstract representations as in academic learning.

The changing environment gives disjuncture to what the person perceives. Disjuncture is in the Shorter Oxford English Dictionary (2006) defined as “separation, disconnection; a breach, a hiatus; a disjointed state.” The person cannot use his habitual behavior unchanged, but must adapt to the disjuncture. Jarvis (2007, p. 5) finds that the rapidly changing world has created situations in which disjuncture happens more often than previously and that this change situation forces people into a lifelong learning situation. When we encounter the rapidly changing world we often feel disjuncture, because of the instability of our surroundings. The learning type “transformative learning” (Illeris, 2007), as earlier described in this chapter, seems to fit into these circumstances, and so does entrepreneurial learning.

Let us return to Kolb’s ideas of experiential learning and put them into a longer time perspective. Kolb discusses experiential learning theory of development. How do individuals develop through life? In Figure 4.10 he shows three phases – acquisition, specialization, and integration – forming a still higher order of learning.

![Figure 4.10: The experiential learning theory of growth and development (Kolb, 1984, p. 141).](image-url)
Kolb describes the three stages like this: *Acquisition* extends from birth to adolescence and marks the acquisition of basic learning abilities and cognitive structures. The *specialization* stage extends through formal education and/or career training and the early experiences of adulthood in work and personal life. The *integration* stage is a result of the personal experience of the conflict between social demands and personal fulfillment needs and the corresponding recognition of self-as-object precipitates the individual’s transition into the integrative stage of development. (Kolb, 1984 p. 145.) According to Kolb not every individual will reach the third stage of integration where the self relates to its own life course. Those who do it are often “awakened” by drastic episodes in their lives as, for instance, a divorce or loss of job. This reflects the critical events that have been discussed earlier in this chapter.

The model too illustrates the growth perspective through four still more complex movements: behavioral complexity, symbolic complexity, affective complexity, and perceptual complexity. They all build on the four learning modes: accommodation, divergence, assimilation, and convergence. Throughout life, people become more mature and better able to handle “the increasing complexity and relativism via the integration of dialectic adaptive modes” which the y-axis in Figure 4.10 describes. They know successes and defeats, and from this they learn through the dialectic process. Normally, people through this process learn to know their own personalities and capacities better and what works for them and what does not.

Throughout life learning takes place in different learning spaces. Illeris (2007, p. 233) describes the following learning spaces: everyday life; the school and education system; working life; the net-based learning space; and the voluntary, interest-driven learning space. He could subdivide any of these further. Looking at the three learning dimensions, they are in varied degrees supported by the learning space. The content dimension is to a high degree supported by the school and education learning space (academic learning), whereas the incentive dimension is very well supported in the interest-driven learning space. Schools with their curricula are very good at systemizing and organizing academic learning spaces.

Kolb (1984, p. 207) questions the current educational strategy of “front-loading” educational experience in the individual’s life cycle. He suggests distributing education more throughout life as statistics show that the individual will, on average, “change jobs seven times and careers three times during his or her working life.” He thinks that younger students should go for more real life experience through for instance internships,
work/study, and so on, and alternate between formal learning in school and practical learning. He also thinks that adults will need the adult work/study version of education to harvest the many fruits of knowledge left behind during their working life. Universities should be centers for lifelong learning. Integrative learning experiences should be directly connected with the integrative challenges of adult life. “Perhaps the richest resources for integrative development lie in the dialogue across age levels that the University for Lifelong learning can provide.” It seems that both Kolb and Illeris praise interaction between theory and practice and also the informal learning that happens in daily life.

Wilkinson et al. (2002) sees the journey to excellence as a series of learning cycles as in Figure 4.11 for a hypothetical learning journey. From basic competence the person will try to develop his competence to an “excellence” level. The figure text explains the issue very well. The figure is made with medical doctors in mind. They seem to have more distinct career paths than business professionals. Please notice the difference between “c” and “d” in the figure, where only “c” is accepted as a career enhancing detour “which may lead to accelerated growth.” Meanwhile, “d” is a detour without much relevance for the career. For businesspeople “c” could be a detour into academia for later return as a business professional. This can make sense, because as Hall and Mirvis (1995) write: “In short, while success breeds success over a period of, say 5 years, over the longer run success may lead to failure – if it is unexamined and unchanged” (p. 276). Career changes can prevent complacency to happen during life courses.
This can further be illustrated through the hypothetical Figure 4.12 which shows how performance can be changed through life by shifting careers. Looking at the figure from left to right, an academic is illustrated (full line). Over his career (time) he first grows fast in academic performance as experience adds to his rather newly acquired academic learning from university. As time goes his performance will grow at a more moderate rate as he adds experience to academic knowledge of still more outdated origin. When he shifts career to the business world his performance will maybe decrease a little bit because of the unfamiliar business environment, but his performance will soon speed up and end up higher at the scale of performance as he can use his academic knowledge in a new (business) context. At the same time he is probably highly motivated in his new career which also helps him to perform better.

A similar explanation can be given for the businessman who shifts career to academia (the dotted line in Figure 4.12 read from right to left). His curve will also rise speedily after a period of acquaintance in the job. He accumulates experience and skills in performing the job functions, but ultimately at a decreasing rate of growth. When he shifts jobs, his experience from business helps him in academia at the same time as academia gives him more knowledge. He ends up higher in performance than he would otherwise be. A new career blows new air into an individual and heightens his experience curve, because he has to learn new things in his new career at the same time as he can draw on earlier learning and experiences from his earlier career.

Figure 4.12: Managing the learning process over a career
Although there is much political interest in lifelong learning it is not so much governed by politicians through education and training programs, but more by learning, which is undertaken by individuals and organizations without much participation by the state (Field, 1988). Governments can facilitate learning by supporting the creation of good curricula for university and adult learning programs, but it does not guarantee optimal learning through a lifetime. Politicians have, however, shown increased interest in adult learning as a consequence of the expected shortage in employees in the decades to come. Both the Swedish and the Danish governments, for example, have introduced more flexibility in claims for different job categories to favor the shifting of careers to job categories in short supply of employees.

Ultimately, learning is an individual thing and an individual responsibility. To learn from experience, naturally, takes time – to learn for wisdom demands experience and time.

Kolb showed in Figure 4.10: The Experiential Learning Theory of Growth and Development that the ultimate phase was the integration phase “self as process – transacting with the world.” This high phase is further elaborated by Kolb in the figure that is presented here as Figure 4.13. As this phase is explained by using his experiential learning cycle it will be interesting to look at in more detail. Kolb (1984) writes that learning, the creation of knowledge and meaning, occurs through the active extension and grounding of ideas and experiences in the external world and through internal reflection about the attributes of these experiences and ideas. He stresses the dialectic movement of the soul going outward (extension/extraversion) into the real world and inward into itself (intention/introversion). This can be interpreted as Kolb’s constructionist view of reality because he sees learning as a combination of value and fact. It will always be a value judgment what the individual chooses to pay attention to and perceive. Kolb illustrates by drawing a figure as illustrated in Figure 4.13.
Figure 4.13: Integrity as the master virtue integrating value and fact, meaning and relevance, and the specialized virtues of courage, love, wisdom, and justice (Kolb, 1984, p. 228)

The model is a way to describe the dialectic dimensions of life: the continuous balancing of facts and feelings. What we feel is a result of our individual interpretation in a concrete situation and this makes us human and gives us personality. Our personality is formed by our interpretations of the four dimensions of the figure. Kolb, 1984, p. 227 writes that the four “virtues” of Figure 4.13 they have the primary function of “preserving and protecting one pole of each dialectic: wisdom the protector of fact and meaning, justice the protector of fact and relevance, courage the protector of relevance and value, and love the protector of value and meaning.” That the poles or virtues are dialectic means that we as human beings should find a balance between them. We should not in every case let one of them dominate. Justice without love will create rule-governed societies that do not discriminate in cases where, for instance, social contexts invite them to. Courage without wisdom, for instance, can create suicide bombers.

The theoretical explorations so far have dealt with how learning takes place. It is acknowledged that learning takes place through many sources and in many situations.
Although learning is an individual thing it is always influenced by the environment in which the individual is placed – not least the social environment. Learning is also strongly influenced by the person’s inner drive and this phenomenon is especially regarded as being in effect for entrepreneurial individuals whom this research is directed towards.

For employees to shift career they must be employable. Their competences should fit into the demands of the specific position they are applying for. Their learning voyages are especially important and critical for their employability when they apply for jobs radically different from the jobs they come from. There are, therefore, good reasons for looking thoughtfully at their career path assessing their experiences. How have they acquired knowledge from experience? How have they developed competence in practice?

Because a person learn from school learning, occupational practice, and everyday life it is very difficult to assess a person’s learning by distinct learning cases, as for instance passing specific exams, only. Learning takes place over a lifetime through a variety of learning cases and consequently, a person’s whole life experience should be taken into consideration when assessing a person for a job. Illeris’ (2007a) model of learning seems to be especially useful in assessing learning over a lifetime as it looks at an individual’s learning as a process with three dimensions: content, incentive, and interaction in an environment. This model fits in well in a business context where knowledge and skills for specific jobs are needed and where motivational factors are so important for work to be done and for the quality of the work done. Furthermore, interaction is important for business relationships to develop. It seems possible to interview people using the framework of content, incentive, and interaction, because their life has been a journey with these three dimensions in their baggage.

Kolb (1984) has especially researched experience as a source of learning. His experiential learning cycle is very concrete and linked to the experience you get from being involved in interaction with an environment. You reflect on this experience and evaluate it, and decide if your action is worth repeating or if you should change it in a new situation. In this decision experience through life seems to be very important. Kolb’s third step in his learning cycle, “forming abstract concepts,” is linked to both theory and practice, and school learning should be especially appreciated in this step as it enhances abstract thinking. Kolb’s fourth and last step, “testing in new situations,” demands initiative and motivation – traits that entrepreneurial persons are especially linked with. In this way
Kolb’s experiential learning cycle is valuable too in understanding and assessing people’s learning.

Schools have always struggled to integrate theory and practice. Fundamentally, practice has always been recognized as a source of learning. For former generations a form of apprentice system was the most important learning system for getting occupational skills, and moral and ethical learning was founded or enhanced in church and family. In recent decades the school system has taken over these educational tasks – sometimes against its will. Apprentice systems are coming in again and schools try to be close to practice situations by introducing assignments from practice or through for instance case studies. Candidates with learning from schools of this type might be regarded as having more relevant learning than from schools occupied with theory only. From experience a person will learn. Through a lifetime a person should, then, learn more. To be employable for a specific job, a person has to have learned what is relevant for performing the job, and assessment has to do with employability assessment. Personal factors should play an important role in this assessment as people interact with others internally in the organization and/or externally with the environment. Kolb talks about an experienced person reaching a certain state of integrity in which he integrates the virtues of courage, love, wisdom, and justice. People with a lifelong career have the possibility of demonstrating these integrity parameters.

One thing is to have a grasp of how different scholars suggest that learning takes place – not at least Kolb. The vital question is, however, whether an individual’s learning can be reliably assessed for practical circumstances in business life and academia. Several researchers have tried to come up with plausible assessment theory and tools, which leads us to the next section.

**4.5 Experiential learning assessment theory and methodology**

Given that an individual can learn by doing, how can one measure whether learning has taken place? Measurement has been used for decades for school learning and exam certificates have been issued. But what about assessment of experiential learning? Assessment has to do with measuring an individual’s learning at a point in time. It can be formulated as a verbal statement or it can be given a quantitative formulated scale value. Knight and Yorke (2003) argue that “assessment is more complex than casual thinking might suggest.” They advocate that we need theories about what can be judged and how
we do it. We need theories about the relationship between assessment and learning, and of the ways in which judgments and claims can be represented. They say that without these theories “attempts to enhance assessment practices are built on sand” (p. 209).

People are becoming more autonomous and learn for themselves more than for companies. Lifelong employment in the same company is becoming more uncommon. As a function of this development workers need to be occupational generalists rather than train for a specific occupational title. Especially for older workers the change to a self-based career will require that they develop their identity and heighten their adaptability so that they can stay current and redevelop their career options (Fouad & Zao, 2000; Hall & Marvis, 1995).

4.5.1 Assessment methodology for competence and employability

How then can learning be assessed? In assessment there is a distinction between summative and formative assessment. *Summative* assessment is described by Knight and Yorke (2003, p. 16) as a system that is designed to sum up achievements and to provide a summary. It is commonly used in formal education to assess the achievements of students, and we communicate it typically at the end of a course or program. It gives some feedback to the learner, but this feedback can come too late to be of value for the learner, because the subjects of the program do not go into the learner’s curriculum next time. *Formative* assessment on the contrary gives students feedback during the learning process and does, then, contribute better to enhance students’ learning. It can be done in a formal or an informal form. Informal formative feedback can be provided for instance by parents, or fellow students during teamwork. Formal formative feedback, on the other hand, is provided by the teacher, for instance after a literature seminar or other team assignment during a course. Assessment is by nature very difficult, because an assessor should know exactly what to assess and have measurement instruments that can do the job. In practice assessors are often short of both. In the business profession employers assess a candidate for an assignment or a job. It is, however, more than difficult to describe a job in valid terms (Friis, 2008). There is also a complex situation on both candidate side and company side. As Knight and Yorke (2003, p. 87) write: “How are complex achievements to be assessed? One answer is to recognize that they are complex and to assess accordingly.”

In assessment you look at a person and his past because you want to predict his future behavior in a job. But are the achievements of a candidate reliable? “We believe it
necessary to consider alternative ways of summing up and presenting achievements” (Knight & Yorke, 2003, p. 211). Knight and Yorke (2003) further think it might be possible to grade a person based on a combination of summative assessment, for instance exam certificates, and some form of evidence of past profession, for instance self-evaluations. All assessments absorb resources and there will always be a trade-off between the energy assessors put into assessment and the expected outcome. Through time different assessment procedures have been used, but the default model seems to be a CV and a personal interview. Employers want the assessment to be generalizable to the applicant’s potential performance in the job. Unfortunately, past performance is not always a guarantee of future success – maybe especially with regard to assessments undertaken in higher education. All assessments are produced for showing the competence of individuals for certain purposes. In a business context the purpose is usually to show competence for a position.

Despite all the difficulties described, how does recruitment take place in practice? The following describes how organizations traditionally recruit, select and place people in their organizations. As organizations consist of people who work to fulfill the mission of those organizations, it is important to get the most suitable people for this purpose. Furthermore organizations must handle people in a cost effective manner. The right people for the right jobs are therefore of utmost importance. This is not simple because people differ in so many ways by education, skills, attitudes, motivation, and experiences, and jobs differ in many ways as well. If there were standard jobs it would be relatively easy to set up criteria for applicants to meet, but few jobs are standard jobs. Even a job as bus driver differs a lot after route, time of day, and traffic patterns, to mention a few characteristics of the job. Similarly, a certain job can be filled by people with different mixes of education, skills, and experiences.

For recruitment to be effective, it must be based on criteria which are as objective and comprehensive as possible to get the best people for the organization. Not doing this can leave the organization with employees whose performance is mediocre (Ostell, 1996). Achievements or outcome can be looked upon as dependent variables, and criteria (predictors or indicators) as independent variables (Prien, 1992, p. 88). Selection can be defined as “finding the right person to fill the right job” (Ostell, 1996, p. 83). The basis for selecting people is information about them. By defining criteria and collecting information about job applicants based on those criteria, the organization tries to predict the future job performance of applicants. By comparing information from more
applicants, the organization should be able to decide which applicants are most suitable for the job. The procedure can be described as in Figure 4.14.

**PHASES:**

- Job analysis
- Job description
- Developing a person specification
- Recruitment
- Screening
- Selection
- Induction and training

Figure 4.14: Phases and activities in a comprehensive selection procedure

Source: Adapted after Ostell, 1996, p. 85

The starting point of analysis in Figure 4.14 is the “job analysis” to identify the specific tasks to be performed. Thereafter a “job description” representing the responsibilities and expected standards of performance of the prospective candidate should be written. A “profile” of an ideal candidate is set up in the “developing a person specification” phase representing for instance education, experience, and personal characteristics of the ideal candidate. The “recruitment” phase deals with advertising the job and producing and distributing application forms and information to prospective applicants. The purpose of the “screening” phase is to eliminate applicants not suitable for the job. It can be because they lack competences or they might be overqualified. In the “selection” process still more criteria are used to evaluate applicants. They can be tests of intelligence or psychological tests, followed by interviews to get further details and meeting applicants face to face. References are collected. The selection process ends by deciding on a candidate.

The crucial interface between applicant and organization is the “person specification” advertised by the company based on “job analysis” and “job description.” The applicant should try to give as accurate information as possible to highlight the specifications, because this will be evaluated by the organization that uses the specifications as “success criteria” for job performance. The better a candidate meets the criteria, the higher the
likelihood of success. This traditional method of recruitment and selection is based on several predictors. Ostell (1996, p. 91) mentions the following in a “person specification”: physical, education/qualifications, specific aptitudes/skills, experience, adjustment/social skills, motivation, and circumstances. The criteria can otherwise be categorized as essential, desirable, or undesirable. In this way applicants can be assessed against the criteria and information given by applicants can predict job success. The criteria can be customized for a specific job. The difficulties with this form of assessment are assessing applicant information towards the criteria and concluding on a single candidate, because the total assessment is an “apple and pear” summation. The “person specification form” should be sent to applicants or the selection criteria should be communicated in a similar way so that applicants can describe themselves based on these criteria. By setting up the criteria, the organization also ensures that the applicants inform them about criteria that might be important but which applicants might otherwise not give – for instance in a curriculum vitae (CV).

Besides the “person specification form” it is usual to ask for a CV. This is a good device for an applicant to show consistency and continuation of his past professional life. It is usual too in a recruitment process to ask for references and follow up by phoning the references for their opinions of the candidate. Screened applicants can be asked to perform different written tests, for instance intelligence tests and psychological tests. As these tests usually are time consuming for both applicant and organization, they are usually only used for short listed applicants (Nielsen, 2008). There are thousands of these tests, and to be worthwhile they should be both valid and reliable instruments in selecting applicants (Ostell, 1996, p. 99). They are, of course, used for their predictive validity for applicants’ future job performance. Work samples can be asked for. For a researcher it can be journal articles and books published; for an architect artifacts designed; for engineer examples of constructions calculated. The last assessment tool to use is the personal interview. Here the applicant and the employer are face to face and can communicate directly and personal chemistry can be assessed.

Another way of examining the above concepts might be to use the competence-based approach. It originated with psychologist David McClelland and his associates who worked for a consultancy company (McClelland, 2008). They argued that intelligence and ability tests had poor predictive validity, especially in the management field, and they suggested competence-based predictors instead. Competences include motives, traits and self-concept together with the traditional knowledge and skills. The
characteristics of the competence-based approach are that people are interviewed about their achievements and are asked to describe how they achieved them. The competence-based approach includes other predictors than the traditional approach, for instance patience, endurance, problem solving capacity, and sensitivity to others. These competences supplement the more technical skills and competences that are asked for in a traditional “person specification.” The competence analysis for a specific job should clearly define the competences asked for so that the evaluation of applicants’ information can be assessed properly. One of the reasons why competence-based selection has come into fore is the still more rapidly changing environment that demands flexibility and adaptation of employees. Selection can no more rely on narrowly defined criteria that previously predicted career success. Organizations have become flatter and more organic with more focus on teamwork. Behavior has become more important for job success (Ostell 1996). In the medical field a definition of professional competence is proposed: “The habitual and judicious use of communication, knowledge, technical skills, clinical reasoning, emotions, values, and reflection in daily practice for the benefit of the individual and community being served” (Epstein & Hundert, 2002, p. 226). This definition places much weight on experiential expressions such as “habitual,” “judicious,” and “reflection” to mention the clearest examples.

Companies need competent people. Competence is a construct that includes skills, experience, and personality, as is illustrated in Figure 4.15. Skills are knowledge a person acquires from whatever source to perform a concrete assignment or function. Learning from experience is in Dewey’s definition a continuation of something that was previously learned and learned in a concrete interaction with the environment. The personality comprises the person’s attitude, behavior, and character. If you look at the sources of experience (please see the legend box of Figure 4.15), you can gain them while performing your job functions. You can learn more, or you can enhance what you have already learned. We can say that you become more skillful or more experienced. A person also experiences from interacting in a cultural context and in a more global view in a cross-cultural context. The more the person interacts across cultures, the more cross-culturally aware he is supposed to be. Learning by doing is by itself the person’s interaction with something in his environment. A person also gains more social competence by experiencing still more social situations in society, at workplaces or in family situations. By biology the person develops from birth through adulthood as Piaget has described, and also in adulthood there are biological phases for a person to live through. The last element in Figure 4.15 is the subconscious learning
that takes place all the time (Evan-Jones, 2004; Jarvis, 2007). The three Illeris learning dimensions are indicated in the legend of Figure 4.15 in Elements of Experience (with bold letters) to indicate how experience can enhance learning.

![Figure 4.15: Assessment of competence and job description](Image)

Relating this figure to the Illeris learning model (Illeris, 2007, p. 26) and talking about assessing a person’s competence, it is relatively easy to assess the content dimension by looking at a person’s CV. Here job functions and assignments are nicely described in list form. Has a person functioned in different cultures if he is supposed to have experience through interaction with those cultures? Some CVs contain membership in different societies and also personal hobbies, and interaction with these should produce experience. What seems to be more difficult to evaluate with a person is his incentives to learn. What triggers a person to learn? Analytically it would be fruitful to find out motivational factors for the individual, because they could be used proactively to motivate an individual to learn further. Some evaluation of incentives can be assessed from a CV, but many cannot. Some incentives might also be unknown for a person – for instance, if he gets a new job which is richer in incentives than expected, he can come into rich learning experiences. Some incentives can even be unconscious; a person may look back and in retrospect become aware of good learning experiences because of incentives in his environment.
The right hand box in Figure 4.15 is concerned with job requirements that a specific company sets up for the applicant to live up to. In theory it seems simple to list job qualifications and then pair them with applicant competences. But job qualifications are not so simple to describe (Friis, 2008). How would you for instance describe a “Marketing Manager’s” job? Just like competence is specific to an individual, a job description is company-specific and difficult to put into words.

Returning to Illeris, he values the more practical learning that takes place in workplaces. He calls this learning by doing; if successful, it leads to competence which can be difficult to obtain otherwise. He praises the concept of competence, because it contains more than only knowledge, skills, and qualifications, which were formerly the only ingredients for assessing a candidate. Competence is a broader concept, and he argues that the required competences might only be achievable in the workplaces where they are to be used (Illeris 2007, p. 221).

Professional executive search companies today try to make a comprehensive assessment of the competence of applicants. This can be illustrated by the selection procedure of the Danish subsidiary of the international executive search company Mercuri Urval. A major part of their turnover is management selection. The flow in this selection is illustrated in Figure 4.16.

![Figure 4.16: Management selection procedures at Mercuri Urval A/S, Denmark Source: Nielsen (2008)](image)
Tests are an integrated part of the assessment process but they cannot stand alone. They are not the only key. The interview after the test is an inseparable part of the tests. Tests are a tool to get a lot of information in a short time. In the following interview, the applicant can explain why he has answered the test the way he has and add depth to test results. The tests are regarded as very important. If applicants are screened and selected by Mercuri/ordering firm the applicants will all go through the tests. They are rather comprehensive and time consuming for both applicants and Mercuri and should, therefore, only be used for shortlisted applicants. Test/test interview/candidate interaction are all important ingredients in the applicant evaluation. The test can set up a hypothesis, but not stand alone. Language tests can also be part of the test battery (Nielsen, 2008). The procedure is illustrated in Figure 4.17.

<table>
<thead>
<tr>
<th>Applicant screening (100)</th>
<th>Tests (10)</th>
<th>Interviews (3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CVs</td>
<td>Objective, cognitive</td>
<td>Competence vs. job demands, personality, chemistry</td>
</tr>
</tbody>
</table>

Figure 4.17: Shortlisting of applicants at Mercuri Urval A/S, Denmark  
Source: Nielsen (2008)

In a study, Mintzberg (1975) asked 2000 managers: “What are the characteristics that distinguish superior performance by working managers?” The answer was that competency is “An underlying characteristic of a manager causally related to superior performance in a management position.” In other words, competence is related to behavior influenced by personal characteristics of the manager such as aptitude, attitudes and personality. Assessing competence can be done on an input basis where the concern is what the applicant brings to the job (for instance leadership and commitment), or on an outcome basis focusing on what applicants achieve (for example reviewing performance against targets) (Ladyshewsky, 2007; Reid et.al., 1992). In the medical doctors’ field they talk about holistic competences consisting of seven roles a special doctor shall master: medical expert; communicator; health promoter; cooperator; organizer; academic; and professional (Ringsted & Aspegren, 2004, p. 1977). In an experiential lifelong learning context the output based method seems appropriate. Kolb 1984 p. 93 talks about “adaptive competence,” in which he regards the concept of competence to be a new approach to the improvement of performance by matching people with jobs. The improvement lies in the fact that previously only aptitude tests were performed and these were too general to be good indicators of people’s job success. Competence assessment,
on the other hand, focuses on the person’s skills as they relate to the specific demands of a job. This issue was further explored in Section 4.3 on competence.

There are three assessment paradigms that are usually used in recruiting and selecting employees: the psychometric paradigm, the social process paradigm, and the person-organization (PO) fit paradigm (Billsberry & Gilbert, 2008, p. 245). The psychometric paradigm looks at recruitment and selection from the company’s point of view. The individual’s knowledge, skills, and abilities are evaluated towards a description of the job from a rational decision-making process. The social process paradigm looks at recruitment as a social process where a relationship is sought to be established during the recruitment process. It does not replace other methods, but it is used to supplement more rigid test methods. The person-organization fit (PO fit) paradigm recognizes that the fit is not one-sided but that there are two parties in a recruitment process that should be satisfied. There should be possibilities for the applicant to assess the job, which is equally important as the employer’s interest in assessing the competence of the applicant (Billsberry & Gilbert, 2008). Appendix 3 details the three recruiting and selection paradigms further. The person-organization fit (PO fit) paradigm seems to be the most contemporary. Employees today look more at jobs as need-fulfilling instruments, not only to satisfy the lower levels in Maslow’s hierarchy of needs. They want to satisfy ego and self-realization needs as well as physical and security needs. It is also important for the employer to know that motivational reasons cause employees to thrive (Carnall, 2003).

The problem with most assessments methods is their inability to link knowledge, skills, and abilities to performance. Much competence is defined by tacit rather than explicit knowledge. Tacit knowledge is not easy to express for an applicant – he just uses his knowledge in different contexts without thinking about it (Epstein & Hundert, 2002). In recruitment situations, recruiters try to get closer to the individual by socializing with them or putting them in decision situations. Some recruitment can last an entire day or longer. The purpose is to see the applicants in as many situations as possible and in some instances stress them. The methods try to go beneath the pretty surface applicants try to show. The problem is, of course, to be able to set up valid and reliable “situations” for the applicants to meet, and also the cost factor, because a lengthy recruitment process is expensive and exhaustive for both company and applicants.
A special problem is, of course, that a person’s fit for a job can have many causes. Cognitive competences are not always the most important ones. For some assignments or even professions, other competences might be in play. There has arisen an interest in looking at a person’s predispositions in the form of multiple intelligences, in which it is claimed that a person can be endowed with different forms of intelligence and to different degrees which might suit different companies in different ways. The cognitive form of intelligence is not always the only form that a company wants for job competence. Professional knowledge is more than factual knowledge and the ability to solve typified problems. Practice puts a person in so many different situations and environments that the optimal solution to problems always will be context dependent. Schön (1991) argues that professional knowledge is defined by the talent to manage vague problems, tolerate uncertainty, and make decisions with limited information. These characteristics are often found in an experienced person who has been in many decision situations and learned from them. Epstein and Hundert (2002) write that the qualities defining a good physician are: the cognitive, technical, integrative, contextual, relational, reflective, affective, and moral aspects of competence. From this it will be realized that there are quite a few dimensions upon which to evaluate an applicant.

Thus far the concepts of employability and competence have been looked at comprehensively. It has been indicated that employers want to hire competent people who thrive in their organizations for fulfilling organizational missions and objectives. Traditional approaches of hiring fall short of assessing personality fit and motivational fit between organization and candidates as these approaches look too much at typified expressions of competence such as standardized expressions of skills and personality characteristics. Also, traditional hiring relies heavily on exam certificates and diplomas and too little on the candidate’s experience. As has been argued throughout this study, experience is important for learning and can give people qualifications that deserve to be assessed by employers. The next sections will go deeper into the elements of experiential learning in order to find methodology suitable for assessing this important prerequisite of competence.

### 4.5.2 Assessment methodology for experiential learning

Dewey in his groundbreaking work *Experience and Education* (1938) claimed an intimate and necessary relation between the processes of actual experience and education. He criticized traditional education with its relatively structured, disciplined, ordered, didactic
tradition for not understanding students’ needs. On the other hand he criticized progressive education for being too unstructured, free, and student-directed. The missing link between the two schools of learning, Dewey suggested, was experience that arises from the interaction of two principles: continuity and interaction. *Continuity* he defined as a person’s experience, which will influence his future for better or for worse. *Interaction* refers to situational influence upon one’s experience. One’s present experience is a function of the interaction between one’s past experiences and the present situation (Dewey, 1938). Experience should be understood as the subjective quality of the person’s knowledge. In training it is, therefore, important to understand the person’s past experience for designing adequate curricula and processes for maximum learning. The stages in the learning cycle can be managed by a facilitator or they can be self-managed or even “unmanaged” in the sense that learning from experience is a normal everyday process for most people (Neill, 2005).

Gibbons and Hopkins’ (1980) scale of experientiality might be relevant for assessing concrete learning outcomes and also a career. The scale is shown as Figure 4.18. The model has five modes with two steps each, making ten steps. There is a progression in the model towards still more advanced intellectual behavior of an individual.

![Figure 4.18: Gibbons and Hopkins’ scale of experientiality](image)

Source: Gibbons and Hopkins (1980); Neill (2004)
When matching experiences with content, one must begin by establishing a range of experientiality for the unit. To facilitate the process, Gibbons and Hopkins (1980) have adapted this aspect of decision-making to the following hierarchy of experiences (here reproduced after Horton and Hutchinson (1997):

- **Receptive mode.** Experiences, or representations of them, are presented to learners, who remain a passive audience throughout.
  1. *Stimulated experience.* Learners passively experience slides, pictures, videos, and other simulations of reality.
  2. *Spectator experience.* Learners experience the object of study with all senses, but as observers.

- **Analytical mode.** Learners conduct field studies in which they apply theoretical knowledge and skill in order to study some event, analyze some aspect of the environment, or solve some practical problem.
  3. *Exploratory experience.* Learners are exposed to interesting sites and encouraged to explore the possibilities of the materials at hand.
  4. *Analytical experience.* Learners study field sites systematically, often applying theory to solve problems in practical situations.

- **Productive mode.** Learners generate products, activities, and services, either assigned or of their own devising.
  5. *Generative experience.* Learners build, create, compose, organize, or otherwise generate products in appropriate settings.
  6. *Challenge experience.* Learners are challenged to pursue goals of productivity and accomplishment.

- **Developmental mode.** Learners pursue excellence in a particular field by designing and implementing long-term programs of study, activity, and practice.
  7. *Competence experience.* Learners focus on a particular field, practice the skills involved, become absorbed in the activity, and achieve recognized competence.
  8. *Mastery experience.* Learners go beyond competence, developing commitment to a set of high personal standards of excellence.
9. **Psychological Mode.** Learners learn to understand themselves and their relationships with others. They accomplish the tasks presented by their stage of development toward maturity and make contributions to the lives of others.

10. **Personal growth experience.** Learners gain understanding of themselves as unique individuals and learn to direct their own activities effectively and responsibly.

11. **Social growth experience.** Learners become more socially competent with people of all ages and act in more socially responsible ways, using their accomplishments in service to the community.

The Gibbons and Hopkins (1980) hierarchy of experience discriminates between passive and active experience. In the last mode (psychosocial mode) it is similar to the concept of social intelligence. It is pointed out that curriculum designers should view the hierarchy in relative terms rather than absolutes, because learning does not take place at just one level of experience. Higher levels of the scale build on learning on lower ends of the scale and a concrete learning situation will often involve several steps of the scale. Higher levels of experience will, however, require a more sustained number of defining elements (activities and skills). The development mode (competence and mastery) was for instance traditionally achieved through the apprentice system where an apprentice became a journeyman who maybe eventually became a master. This last argument is stressed by Nielsen and Kvale (1999). The model resembles the thinking of Wilkinson et al. (2002) with their “journey to performance excellence” thinking, Figure 4.11.

Also Kirkpatrick (1977) has divided the evaluation process into several stages that reflect different layers of learning from a simple attitude measurement to the more complex behavioral and outcome measurement. His evaluation process has the following stages:

1. **Reaction:** How do the participants feel about the program they attended? To what extent are they “satisfied customers?”
2. **Learning:** To what extent have the trainees learned the information and skills? To what extent have their attitudes been changed?
3. **Behavior:** To what extent have their job behaviors changed as a result of attending the training program?
4. **Results:** To what extent have results been affected by the training program?
He discusses the difficulties of determining the effects of learning and calls for evidence of satisfactory learning. He shows that for learning, behavior, and results, only evidence can be obtained, unless you make controlled experiments. This should be kept in mind when reading this dissertation. It is much like psychoanalytical analysis of a person, in which the psychoanalyst relies on evidence found by interviewing the individual and designs his cure according to that evidence.\(^2\)

Comparing the Gibbons and Hopkins model (Figure 4.18) and Kirkpatrick’s model, it appears that the first model is functional (task related), focusing on input in the form of training tools, whereas the Kirkpatrick model is processual, looking at changes and outcome. In curriculum design the Gibbons and Hopkins model can be quite instructive, as the planner can choose learning tools that address different learning levels. In a business school context it is, for instance, common to let students write papers (for instance in Sweden a C-uppsatts) addressing a concrete theoretical or practical issue. Students will work on this issue for weeks and write, for instance, a 50-page paper using steps 4-7 in Gibbons and Hopkins’ model. To step up further, these students will have to actually do these jobs in practice and try to excel at them. Normally, lecturing is an effective way to communicate theory and is a precondition for later learning methods. The Gibbons and Hopkins model can be a good template in curriculum development as it is possible to include different teaching methods to deal with different steps in this progression model. Excursions, company stays, and a year abroad in a subsidiary are examples of teaching methods that address upper steps in the model. The Kirkpatrick model could be used after courses in the framework of course evaluation questionnaires. With the right questions it should be possible to track reaction-learning-behavior-results which are the components of his model. This procedure will be based on self-evaluation, but can be quite credible – especially concerning changes in a person’s standing.

Experiential learning of individuals is most conveniently and maybe also most credibly assessed by themselves through reporting their own curriculum vitae and narratives. They can express their learning by referring to learning cases in the past. Based on this self-reporting, the hiring organization can relate their perceived experience to the Gibbons and

\(^2\) The KaosPilots Denmark with affiliates in Sweden, Norway and the Netherlands enroll new students after they answer a questionnaire and attend a three-day event school to evaluate students. A vital part of the seven- to eight-page questionnaire is about the person and his life which illustrates his experience. These questions do not focus on usual CV-type questions, but concern the person and his values. How are his cultural, political, and world interests reflected in his narrative? What are his motivations and aspirations? What is he proud of? There are also some creative tests in the questionnaire to perform for applicants (Stockholm, 2007).
Hopkins scale of experientiality and assess their learning in this way. Given that people are experienced and their learning has made them competent for the jobs in question, they should also have personalities that allow them to perform well in their jobs and be good team partners. The next section will look at this issue.

4.5.3 Assessment methodology for personality

In assessment practice there is overall focus on academic knowledge and not much on personal qualities. The former is easy to measure through looking at diplomas and degree certificates, but the latter is difficult and not suitable for mass assessment. Wolf (1995, p. 45) writes: “It is perfectly possible, for example, that authentic assessment would be better if they could be created – but that, in fact, they are impossible to carry out.” She concludes that it if pure competence-based assessments are too theoretical constructs it might be better to forget about them and set up a proxy-measure such as academic performance over a wide range of subjects to do the job. Evan-Jones (2008) finds it, however, not so difficult to make an assessment of personal qualities. He has an ABC model (Attitude, Behavior, and Character) and indicates a simple assessment of an individual during his interview and social time with the candidate. For each of the three personal criteria he would have only three to five observation questions and then tick off on a simple scale with four grades. His opinion is that good scores on an ABC model are very important for job success. “Most people can learn 60% of what is demanded in a job relatively quickly if they have good ABC scores” (Evan-Jones, 2008).

Personality characteristics might also be assessed from typologies, which might be easier to assess in a practical interview situation, because they use personality types that are recognizable in practice. The typologies could also be more research grounded with accompanying questionnaires for applicants to fill out. Gardner (2006) is rather critical of the developments that could be witnessed during the last decades. He finds, for example, that testing has gone too far. He favors assessment more than testing as it provides information about the skills and potentials of individuals, which produces useful feedback for the assessed individual and for those who do the assessment. In comparison to testing, assessment provides a much wider perspective of the individual’s qualities. Gardner (2006a) has defined five personality profiles (Table 4.5):
Table 4.5: Five minds for the future

<table>
<thead>
<tr>
<th>Five minds</th>
<th>Description</th>
<th>Examples (formal education)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Disciplined Mind</td>
<td>Employing the ways of thinking associated with major scholarly disciplines (history, math, science, art, etc.) and major professions (law, medicine, management, finance, etc., as well as crafts and trades); capable of applying oneself diligently, improving steadily, and continuing beyond formal education.</td>
<td>Mastering of history, mathematics, science, and other key subjects; completing professional training.</td>
</tr>
<tr>
<td>The Synthesizing Mind</td>
<td>Selecting crucial information from the copious amounts available; arranging that information in ways that make sense to self and to others.</td>
<td>Preparing for assignments and tests in school by organizing materials in ways that are helpful to self and others (especially the grader!).</td>
</tr>
<tr>
<td>The Creating Mind</td>
<td>Going beyond existing knowledge and syntheses to pose new questions, offer new solutions, fashion works that stretch existing genres or configure new ones; creation builds on one or more established disciplines and requires an informed “field” to judge quality and acceptability.</td>
<td>Going beyond class requirements to pose new questions; coming up with unexpected but appropriate school products and projects.</td>
</tr>
<tr>
<td>The Respectful Mind</td>
<td>Responding sympathetically and constructively to differences among individuals and among groups, seeking to understand and work with those who are different; extending beyond mere tolerance and political correctness.</td>
<td>Seeking to understand and work effectively with peers, teachers, and staff, whatever their backgrounds and viewpoints.</td>
</tr>
<tr>
<td>The Ethical Mind</td>
<td>Abstracting crucial features of one’s role at work and one’s role as a citizen and acting consistently with those conceptualizations; striving toward good work and good citizenship.</td>
<td>Reflecting on one’s role as a student or as a future professional and attempting to fulfill that role appropriately and responsibly.</td>
</tr>
</tbody>
</table>

Source: Tabulated from Gardner, 2006, pp. 154-158

These minds reflect personalities and could be used as assessment criteria as well. Gardner describes that there is development throughout life in these minds – they are developed in a certain order: respect, discipline, synthesis, and ethics. From practice we feel that different people are differently endowed with these qualities. Some of these minds might be in special demand for specific jobs, but it probably also goes into what we call “chemistry,” and we choose employees or peers so they comply with our own “chemistry.” This might be fully justified as it is important for working together.

For management, Adizes’ theories of managing styles have been popular for some years. The styles are not personality characteristics, but a way to describe managers’ qualities in the art of managing other people. The categories are:

- (P) Producing results for which the organization exists
- (A) Administering for systematized efficiency
- (E) Entrepreneuring for proactive change
- (I) Integrating the parts of the organization for long-term viability

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A leader should excel in at least two of those, one of which is (I) Integrating. If a leader is performing two roles in which he is strong in one and weak in the other, he is mismanaging. A leader should therefore try to perform his leadership roles (PAEI) in a balanced way, although in some contexts one role can be dominant. The philosophy of Adizes’ theory is that a leader is not a style, but he can behave in styles suitable for the tasks, and thereby it is not equivalent with personality characteristics. It seems, however, that a person has a favorite style or styles and in an executive search situation it might be valuable to assess a person’s favorite management styles (Breckenridge Institute, 2008).

Assessment centers typically use structured guidelines and checklists containing indicators for competences. One example is the following scaled list (Edwards, 2005), Table 4.6.

<table>
<thead>
<tr>
<th>Competence</th>
<th>Unemployable (No evidence of meeting competences)</th>
<th>Employable (Competences met at some level)</th>
<th>Highly Employable (All competences met at highest level)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employability</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility/Adaptability</td>
<td>Closed to alternatives. Likes to do one job at a time.</td>
<td></td>
<td>Open minded. Change oriented. Able to change roles quickly and successfully.</td>
</tr>
<tr>
<td>Communication</td>
<td>Unclear, unstructured sentences. Doesn’t make points convincingly. Difficult to hear. No eye contact. Defensive manner.</td>
<td></td>
<td>Clear, succinct sentences given in a persuasive and confident manner. Good use of eye contact. Open body language and enthusiastic manner.</td>
</tr>
<tr>
<td>Analytical Ability</td>
<td>Accepts things at face value. Doesn’t pick up on logical steps or question premises.</td>
<td></td>
<td>Critically evaluates information given. Identifies and evaluates alternatives. Makes sensible assumptions, where appropriate.</td>
</tr>
<tr>
<td>Decision-making</td>
<td>Rushes into decisions without evaluating options. Alternatively, avoids making decisions, passing responsibility to others.</td>
<td></td>
<td>Evaluates before making a decision. Consults and listens to others. Takes responsibility. Prioritizes actions.</td>
</tr>
<tr>
<td>Teamworking</td>
<td>Prefers working alone. Doesn’t support those around them. Makes only negative comments. Poor at making/influencing group decisions.</td>
<td></td>
<td>Evidence of taking different roles in a team, including leader. Supports others. Makes positive contributions throughout.</td>
</tr>
</tbody>
</table>

Table 4.6: Indicators of some key competences

Source: Edwards (2005)
Assessors can use measures as shown in Table 4.6 as indicators of competences. They are linked to personality and the assessor can get a profile of the applicant and an assessment of his performance in the job in question. To do the assessment demands personal interview and observation of the applicant by the assessor or assessors as more administrators and/or executives should participate in the assessment because the assessments often will be based on indirect evaluations. Besides personality characteristics, it is important that an applicant has a learning style that is compatible with the job he is applying for. The next section looks into this.

4.5.4 Assessment methodology for learning styles

There are several personal adult learning style inventories on the market, for instance those by Knowles, Holton III, and Swanson (2005) and David Kolb (1984). Only Kolb’s will be presented here because his methodology is based on his experiential learning cycle, which has been so extensively described in this study.

To test one’s own learning style a *Learning Style Inventory* questionnaire can be used. Respondents are asked to rank four words that best describe their own learning style. One word in each item corresponds to one of the four learning modes in Kolb’s learning cycle – concrete experience (sample word, *feeling*), reflective observation (*watching*), abstract conceptualization (*thinking*), and active experimentation (*doing*).

All individuals develop their own learning styles, with some strong and some weak points. The learning styles described here follow Kolb’s learning cycle. Convergent (unambiguous) knowledge concerns concentration on a specific output from a given input (inference or deduction). Divergent (ambiguous) knowledge means the development of various potential outputs from the same input (creativity and diversity). Assimilative and accommodative knowledge are taken from Piaget. “Assimilation is about taking in something in an already existing structure. In accommodation it is the receiving organism that changes itself in order to be able to take in influences from the environment” (Illeris, 2007, p. 37). The following describes distinct learning styles and direct refers to Kolb (1984, p. 77-78, p. 93-94). Labels of learning types refer to Hay Group (2008).

“The convergent learning style relies primarily on the dominant learning abilities of abstract conceptualization and active experimentation. The greatest strength of this
approach lies in problem solving, decision-making, and the practical application of ideas.” Kolb links this learning style to decision skills: creating new ways of thinking and doing, experimenting with new ideas, choosing the best solution to problems, setting goals, and making decisions. The label to put on a person with a convergent learning style is “the decision maker.”

“The divergent learning style has the opposite learning strengths from convergence, emphasizing concrete experience and reflective observation. The greatest strength of this orientation lies in imaginative ability and awareness of meaning and values.” People with this learning style are supposed to be sensitive to people’s feelings and to values, listen with an open mind, gather information, and imagine implications of ambiguous situations. The label to put on a person with a divergent learning style is “the creator.”

“In assimilation, the dominant learning abilities are abstract conceptualization and reflective observation. The greatest strength of this orientation lies in inductive reasoning and the ability to create theoretical models, in assimilating disparate observations into an integrated explanation.” Kolb relates assimilation to thinking competences: organizing information, building conceptual models, testing theories and ideas, designing experiments, and analyzing quantitative data. The label to put on a person with an assimilating learning style is “the planner.”

“The accommodative learning style has the opposite strengths from assimilation, emphasizing concrete experience and active experimentation. The greatest strength of this orientation lies in doing things, in carrying out plans and tasks and getting involved in new experiences.” This learning style can best be termed action skills: committing oneself to objectives, seeking and exploiting opportunities, influencing and leading others, being personally involved, and dealing with people. The label to put on a person with an accommodating style is “the do-er.”

McClelland (2008) argues that people with different learning styles will fit into different job types. In assessing competence it is, therefore, important also to test learning styles as they indicate behavior too. A person with a convergent learning style will probably be a good CEO. A person with a divergent learning style has his strength in the more soft values in an organization and will probably feel comfortable in a human resource department. A person with an assimilative learning style would probably fit into the analytical functions of a company. A person with an accommodating learning style has
entrepreneurial characteristics that many companies value today. Executive search companies today test these things under the label of “personality tests,” for instance Mercuri Urval, and they are important for assessing the right person for the right job.

The outcomes of the assessments as described in this section are typologies and the employer comes closer to the person-organization fit, but it is still not enough to evaluate the best candidate for a job. A candidate can have “a creative mind” (Table 4.5), be good in “Communication” (Table 4.6), and be “a creator” according to Kolb’s typology, but still have personality characteristics that are not attractive for the employer. More direct assessment of personality will help to decide on the candidate, as will be proposed in Chapter 5.

During a career there can be a need for joining formal learning programs after some time in practice. As formal learning programs offered by educational institutions have entrance requirements, there is a need for documentation by the learner of competence acquired from practice. The next section looks at assessment methodology for prior experiential learning.

4.5.5 Assessment methodology for prior experiential learning

As can be seen in the previous section on experiential learning (Chapter 4, part 4.3.2), research by Illeris (2007), Jarvis (2007), Kolb (1984), and Larsen (2004) show that learning takes place inside as well as outside education. Formal learning takes place in an institutionalized setting such as schools, it is intentional, and certificates are issued. Non-formal learning is similar to formal learning but there is no legally or socially recorded certification. Informal learning is not intentional, is not structured, and does not lead to certifications (Brinke et al., 2008, p. 52). Assessment of school learning is institutionalized through issuing of exam certificates whereas assessment of learning from experience is still in the making. “The problem is not the ‘discovery’ and ‘acceptance’ of informal learning, but rather its evaluation. This presupposes more precise notions about the extent to which informal learning can be operationalized” (Alheit, 1999). There are, however, some universities and colleges that have introduced a system for accreditation of prior experiential learning (APEL) to facilitate their enrollment of students without formal qualifications for their courses. The assessment system emerged in the late 1960s and the beginning of the 1970s as a result of student-centered educational movements which highlighted the relationship of learning to “real life” and students’ participation in
faculty decisions (Michelson, 1996). The system was called Assessment of Prior Experiential Learning (APEL). The purpose of the system was to assess learning from nontraditional academic practice and work practice and transform experiential learning into college credits.

Different organizations offer assessment of experiential learning. A well known organization is CAEL, the Council for Adult and Experiential Learning in USA (CAEL, 2008). CAEL offers assessment of individuals’ experience through their answering of questionnaires. The assessment is translated to college credits. This system is primarily dedicated to the education sector. APEL recognizes learning that results from work or life experience, as opposed to a taught course. Different universities and colleges have given their interpretations of APEL (Harvey, 2004)³ A few of them will be cited here:

- “The formal acknowledgement (based on professional assessment) of learning acquired from previous experience, usually from experience unrelated to an academic context” (Harvey, 2004).

- “APEL is the process whereby the individual’s competences (knowledge, skills, attitudes and abilities) gained in non-formal (work-based) and informal (life experience) learning environments are accredited (assessed and recognized) – or not” (Adams, 2007).

- “When the learning is identified, articulated and organized into clear statements of claims for knowledge and skills, it can be recognized, assessed and accredited for those who want it, provided it meets the regulations of the formal course in

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³ The philosophy behind APEL is that individuals can acquire knowledge, skills and analytical abilities through life and work experience that are comparable to those from a higher education award. These are transformed into credits. As an example, a person who learned management skills while working at a restaurant could be granted APEL credits in small business management. The London Metropolitan University (2006) states that the credit can be gained through the submission of a piece of work (such as a report or portfolio) which is assessed by the University. The university states: “To make a successful claim for APEL the learning you have achieved must be at the same level as the learning you would have been expected to achieve as part of your program of study.” This statement shows that the experiential learning is compared with learning from school and therefore is evaluated on a knowledge scale. Anglia Polytechnic University demands a portfolio, containing commentary and evidence (samples of work and an accompanying explanation), and in some instances testimonials from previous employers. The Flemish Government has introduced an enactment for APEL and claim several advantages by enforcing it: Social promotion according to seniority can be achieved; the skills of unqualified school-leavers can be reassessed; unemployed persons can complement their curriculum vitae; and labor market entrants can more clearly state their abilities.
question. This is because it frequently proves to be worthy of formal recognition in relation to a course which an individual may wish to follow” (Evans, 2003, p. 17).

The definitions show that informal learning has the potential to compensate for the lack of competence gained in formal education.

Evans (2003) claims that APEL is based on the notion that people learn through their activities whatever they are. They can be work, leisure, hobbies, travel, television, radio listening, reading, and courses not part of a program. He specifies some of the activities a person can do for APEL assessment: “Informal learning from work, community, family life, independent learning, museums, fun and games, whether intentional learning by personal choice and/or accidental through some other activity.” (p. 17) In a Kolb learning cycle context it can be questioned whether learning from experience has the same value as academic learning – especially in phase three in the model: “Forming abstract concepts.”

Maybe therefore Revans University sets limits for APEL in the equivalency examination by for instance a 50% limit for experiential learning going into a degree. If Revans University, named after the “father of action learning,” is modest about credits for experiential learning, it must be respected that learning has two sources: from academia and from experience.

In an evaluation report from the Danish Government, KaosPilot education was asked to more clearly formalize student admission criteria. The school has it in their business mission to offer education for young people based on the following core values: “Playful, real world, street wise, risk taking, balanced, and compassionate.” In 2002, 201 applicants went through a longer admission process with written assignments and self-descriptions, and 75 students were accepted for next test which contained a four-day workshop where students were presented for – and tested in – work forms of the school. They should also complete a long series of creative and professional assignments set by the school. It is interesting that the Government (subsidizing the education) has a need for rules and regulations whereas KaosPilot education believes in more non-measurable qualities by students and lecturers. For instance, when hiring lecturers, according to the evaluation report, KaosPilot education did not ask for curriculum vitae of the lecturers, but hired them on experiential criteria. (Danmarks Evalueringsinstitut, 2002). As Halvorson (2006) suggests, any program must have its own requirements and APEL must be adapted to fit into different disciplines.
Young (2003) also warns that institutions using APEL limit themselves to what can be measured and certificated and expose themselves to the risk of neglecting important hard-to-measure competences. He finds it important that the different stakeholders find a balance between what should be measured and what should not. Evan-Jones (2008) apparently shares this opinion, as an important part of his assessment procedure is the assessment of personality of applicants in a personal interview environment. Evans (2003 p.18) points out the value of APEL as an educational tool as well as an assessment tool. Whitaker (1989) warns that it is easier to quantify experience than it is to measure learning, as there is no guarantee that a certain amount of experience will yield the equivalent amount of learning. On the other hand, when a person assesses himself for APEL purposes, he has to make self-evaluations and articulate these for assessment purposes, and this gives him insight and awareness of own value, because often a person has more learning than he immediately has thought about. It can give him self-confidence as well and contribute to his personal development. Edwards (2005) writes that competence frameworks and competence indicators should be based on candidates’ understanding of: “which competences they have; how they have obtained them; which indicators they can quote to evidence the competences; how to highlight the impact of the competences; how they might be applied and evidenced in new situations, and how to develop or enhance competences” (p. 6). He advises candidates to assemble evidence of their competence through assembling “competence indicators.”

For a person to apply for credits based on his experience, he has to describe his knowledge, skills, and abilities for APEL assessors – often based on required criteria from the APEL organization. Satisfying application requirements can be a hard job, as an applicant has to recall learning cases from far in his past and express how these cases enhanced his learning. A tool to register, update, and reflect on own learning cases is the portfolio as described in the next section. By having an updated portfolio it is much easier to document learning and competence in job application cases.

4.5.6 Portfolios as assessment methodology

In recent decades we have seen an increased use of portfolios. There are many definitions of portfolios. In management, for example, so called project portfolios have been used for selection and resource assignments. These can be related to research and development (R&D) projects (Blomquist & Müller, 2006). They are also used in human resource management for assessment purposes. For example they can be described as a collection
of evidence of achievement, including information on assignments or projects developed or implemented and artifacts made by learners during learning programs or as part of other life and work experiences; all of these can be submitted for formal assessment and accreditation (Ecclestone, 2005). Another definition reads: “a systematic collection of educational and work products that have been compiled or accumulated over time, according to a specific set of principles” (JCSEPT, 1999, p. 179). A third definition is: “A portfolio is a collection of evidence, usually in written form, of both the products and processes of learning. It attests to achievement and personal and professional development, by providing critical analysis of its contents” (McMullan et al., 2003, p. 288). It becomes clear that portfolios deal with the collection of achievements of people during their learning process that is recorded in various ways. However, the variety of definitions also shows that there is no standardized solution for the portfolio format.

There are many benefits from producing the portfolios and the use of them. The person has to reflect on his learning; he can observe gaps in his competence and set up a plan for closing the gap. Besides, the portfolio is an excellent “database” of reference in an employment situation, where a curriculum vitae and a cover letter can be more easily produced (Romaniuk & Snart, 2000). McMullan et al. (2003) find it important that a portfolio is not only a collection of items in a folder, but that the student by reflecting on these items demonstrates learning. Knowles’ (1980) assumptions regarding adult learners are the basic foundation of portfolios: (i) the learner is self-directed, (ii) the student’s past experiences are a rich resource for learning, (iii) readiness to learn develops from life tasks and problems, and (iv) the student demonstrates curiosity and is self-motivated to grow and achieve (Glen & Hight, 1992; McMullan et al., 2003).

Use of portfolios has been known in the arts where for instance painters, designers, or architects collected their work for presentation purposes. It came into education as a consequence of the wish to assess experiential learning (Michelson, 1996). In education, portfolio-based self-assessment of students’ experiential learning typically has four steps: reflection on experience; extended written articulation of the person’s knowledge; presenting evidence of knowledge; and naming and quantification of the knowledge as a given credit award. These portfolios typically start with self-reflection around guided outlines delivered by the institution. It can contain inquiries about learning experiences from different activities such as paid and unpaid work, community involvement, and life activities in general. Completed portfolios typically contain both narrative discussions and different forms of documentation. In many institutions the relevant faculty will evaluate
the portfolio and call in the student for a deeper conversation before deciding on the credits to offer (Michelson, 1996, p. 643). Portfolios, in this way, make experiential learning visible for the learner as well as the assessor. Portfolios are today introduced into other professions than the arts and education, for instance in the medical field. Here the portfolios are used for both formative and summative assessment purposes. The formative part aims at strengthening the medical doctor’s learning whereas the summative use of the portfolio can be for certification purposes. In the future it can even be expected that medical doctors shall document their learning on a regular basis for re-certification purposes (Wilkinson et al., 2002).

The problem with making assessments based on portfolios is the question of validity and reliability. How can an assessment system be established to fulfill these two needs? After all, assessment has to be related to an objective. The objective could be to formulate assessment criteria for a specific profession or more narrowly for a specific job.

“The precondition for integrating informal learning processes, however, would be that companies or continuing education institutions that link entry to specific evidence of entitlement reveal and justify their particular requirements. Only then are applicants given the chance to adapt their learning profiles to the perspectives of those on the ‘customer’ side, and to integrate any potentially important informal skills in a meaningful way” (Alheit, 1999).

The assessment criteria for enrolling into an education program for medical doctors wanting to be special doctors in orthopedic surgery at a Danish hospital can be given as an example. Besides personal data, permissions to function as a doctor, completion of introductory positions, and certificates, there should be listed all positions at hospitals. Then the supplementing criteria should be addressed as seen in Table 4.7.
Table 4.7: Assessment criteria for education for special doctors in orthopedic surgery in Denmark

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max. points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Criterion 1 – General</strong></td>
<td>8</td>
</tr>
<tr>
<td>Positions outside the specialty</td>
<td>2</td>
</tr>
<tr>
<td>Positions inside the specialty</td>
<td>2</td>
</tr>
<tr>
<td>Special-relevant courses within the specialty’s medical expert role</td>
<td>1</td>
</tr>
<tr>
<td>International experience (minimum 3 months)</td>
<td>1</td>
</tr>
<tr>
<td>Independently performed surgeries</td>
<td>1-2</td>
</tr>
<tr>
<td>Full time stay at a research institution (minimum 6 months)</td>
<td>1</td>
</tr>
<tr>
<td><strong>Criterion 2 – Communicator</strong></td>
<td>3</td>
</tr>
<tr>
<td>Course in communication</td>
<td></td>
</tr>
<tr>
<td>Adult pedagogical course</td>
<td></td>
</tr>
<tr>
<td>Minimum 40 hours of confrontation teaching</td>
<td></td>
</tr>
<tr>
<td><strong>Criterion 3 – Promoting health</strong></td>
<td>2</td>
</tr>
<tr>
<td>Clinical work or working as adviser in humanitarian positions abroad</td>
<td></td>
</tr>
<tr>
<td>Active participation in health campaigns</td>
<td></td>
</tr>
<tr>
<td>Work as district doctor in Greenland</td>
<td></td>
</tr>
<tr>
<td>Completion of MPH or MIH</td>
<td></td>
</tr>
<tr>
<td><strong>Criterion 4 – Cooperation</strong></td>
<td>2</td>
</tr>
<tr>
<td>Work on advisory boards, union or scientific boards</td>
<td></td>
</tr>
<tr>
<td>Union representative</td>
<td></td>
</tr>
<tr>
<td><strong>Criterion 5 – Manager/administrator</strong></td>
<td>2</td>
</tr>
<tr>
<td>Position in hospital management</td>
<td></td>
</tr>
<tr>
<td>Member of further education boards</td>
<td></td>
</tr>
<tr>
<td>Master’s Degree in management</td>
<td></td>
</tr>
<tr>
<td><strong>Criterion 6 – Academics</strong></td>
<td>6</td>
</tr>
<tr>
<td>Case studies or speeches in scientific organization, Article in C6-reviewed journal as co-author</td>
<td>1</td>
</tr>
<tr>
<td>Article in C6-reviewed journal as first author</td>
<td>2</td>
</tr>
<tr>
<td>Five or more published scientific articles</td>
<td>3</td>
</tr>
<tr>
<td>PhD education</td>
<td>5</td>
</tr>
<tr>
<td>Dissertation (Dr. Med.)</td>
<td></td>
</tr>
<tr>
<td>Foreign dissertation Assessment</td>
<td></td>
</tr>
<tr>
<td><strong>Criterion 7 – Professional</strong></td>
<td>2</td>
</tr>
<tr>
<td>Organizational work in humanitarian organizations</td>
<td></td>
</tr>
<tr>
<td>Other education in the health sector</td>
<td></td>
</tr>
</tbody>
</table>

Source: Videreuddannelsessekretariatet i Videreuddannelsesregion Nord (2008) Extract from application form for 2nd half 2008 for special doctors in orthopedic surgery, Denmark
For a candidate with an updated portfolio it is relatively easy to deliver the information demanded for the seven criteria in Table 4.7. They cover a broad spectrum of competences for performing as a medical doctor. Because the number of positions available is usually considerably lower than the number of applicants, the hospitals have a strong propensity for getting well educated doctors in the system as applicants are prioritized according to their fulfillment of the criteria. The example given shows that the criteria are very job specific. A medical doctor in another specialty is assessed by other criteria. Some of them will be common, but others are specialty specific.

For applicants such assessment systems are standardized and applicants may claim that they have competences outside these criteria that should be included. The criteria are collected from different organizational units within the medical doctor profession and should be embedded in a “total quality assurance system.” It is transparent for all stakeholders involved, for instance policymakers, administrators, assessors, applicants, and society. Besides the schema shown in abstract in Table 4.7, there are companion instructions for applicants so they can collect information relating to all criteria set up by the authorities. Applicants must do a lot of work to supply all this information and author descriptions, but the system seems to produce an egalitarian procedure for selecting doctors. The criteria shown in Table 4.7 are very knowledge and skills focused, and the authority calls for proof in the shape of certificates, lists of work assignments done, years abroad, and similarly quantifiable criteria. The criteria could be supplemented with some for informal and non-formal learning and reflections of the applicant’s own evaluation of learning through theory-practice cases. This is normal portfolio practice (McMullan et al., 2003). Alheit (1999) points out that the self-reflection on one’s own learning experiences – “accounting to oneself” – that is made visible for others must be subjected to certain assessments and that this evaluation concept has a strong political bias.

At Umeå University a portfolio of pedagogical qualifications has recently (2006) been introduced. It is described as a portfolio of pedagogical qualifications for the purpose of promotion, recruiting and career planning. The purpose of the portfolio is to provide a basis for the assessment of teaching skills. The content of the portfolio is specified as containing: self-reflection and an account of teaching experience, teacher training and in-service training, pedagogical development work, education planning and administration, assessment of teaching performance, research on education and other pedagogical qualifications (Umeå University 2006). In the author’s opinion the portfolio is an
excellent tool for both formative and summative assessments. Many professions could introduce the portfolio for use in recruitment situations. As was seen in the Umeå University recommendation, the portfolio could be recommended with proposed content, and following this breakdown of content it would be easy for candidates to satisfy the requirements for a new position. In principle, every organization can formulate its own criteria for the employee to address, but in any case an established portfolio would help an applicant in a job application situation.

4.5.7 Critique of portfolios

A portfolio can be looked upon as an extension of curriculum vitae. It is to a great extent verbalized. The idea behind it might seem sound, as everything relevant to competence that an individual does is registered in a (digital) portfolio and retrieved on demand. The problem can be to evaluate what is relevant enough to save and what is too minor to save. As learning is going on all the time, a registration of learning experiences would be nearly endless. The original aim of portfolios was that they should be pedagogical tools to motivate students for further development. The assessment should be formative, incorporating a teacher, tutor, mentor, or assessor. Use of portfolios can, however, be used in summative assessment as well. In that case assessors should provide clear guidelines and criteria for assessment (Glen & Hight, 1992; McMullan et al., 2003). An example of such criteria was shown in Table 4.7.

For an assessor – for instance an employer – it can be quite demanding to assess portfolios of applicants. The moment they are not standardized they can have many formats, structures, and content, and they will appear quite dissimilar. The workload will be considerable and thereby costly for organizations. There is also a question of evidence. How can an assessor be sure that what is told is right? How is the subjective writing coloring reality? Previous studies have suggested that self-assessments are viable components in an evaluation process that normally comprises judgments by professionals, for instance Van der Kamp (2006) and Shrauger and Osberg (1981). In the case of psychologists and therapists, for instance, using a variety of tests, observation scales and questionnaires: “Individuals possess an extensive data base from which to draw inferences about themselves, a much larger base than even the most ambitious external evaluator is likely to develop” (Shrauger & Osberg, 1981, p. 322). Van der Kamp (2006) argues for a triangulation principle in assessment as an analysis and confirmation principle. He gives the metaphor of court proceedings where witnesses of both parties
must be called to find out the truth so the investigator will have a more solid foundation for his conclusions if different sources corroborate the findings. McMullan (2003, p. 287) writes that “no assessment schedule can ever be ‘assessor proof,’ as each assessor has their own interpretation of competence.”

A special problem is the ABC (Attitude, Behavior, and Character) assessment that is not directly present in the written portfolios. The portfolios can maybe confirm that a certain professional standard is reached, as in standardization systems such as ISO 9000, DIN, and others. It can be claimed that the use of portfolios can produce “mass products of the same standard” as in industrial standardization and accreditation systems. However, portfolios cannot ensure the fulfillment of quality criteria not defined in the standard criteria and they do not take valuable ABC factors into consideration. In some (many) cases, higher ABC scores could compensate for lower portfolio scores, but such individuals are screened out in the bureaucratic process.

For public organizations, for instance universities, pedagogic portfolios are being introduced and will become a statutory tool in employee selection. There can be foreseen a huge bureaucratic system for making these pedagogic portfolio assessments with appointment of assessors and involvement of professors. It can be foreseen too that these portfolios will be extensive, 50-100 page writings. With for instance 30 applicants for a position it will be quite a task to employ a new lecturer. A rejected applicant can then lodge a complaint to a complaint board. One can ask whether this bureaucratic system will lead to better selection of employees. One can also ask where the leadership in hiring people is, because the manager has no say – it is all determined by testing procedures. One can ask where the diversity in the staff of employees is. How can an eccentric person be hired for the organization?

Companies also recruit internally. Do they need assessment procedures for this? Hiring people is a complicated matter where several competences should be assessed, but assessment systems necessarily can only handle a fraction of them. There are still skills and competences to be evaluated beyond the formalized assessment criteria. Successful organizations are often founded by eccentric people – or people with special personalities. Examples are many, but we can mention IKEA with Ingvar Kamprad, H&M with Erling Persson and his son Stefan Persson, and the Danish container liner A.P. Møller with Arnold Peter Møller and his son Mærsk McKinney Møller. These owner-managers will often recruit from inside, because they find understanding of the company culture
important and personal qualities more important than degrees and academic qualifications. In an interview with Dagens Industri (2008), Stefan Pearsson tells that he is going to hire a new CEO after the current CEO retires, and he plans to recruit from inside because of the quality factors just mentioned. When Mærsk McKinney Möller stepped down as active chairman of the board of A.P. Möller a few years ago, he did appoint an external person as his successor, but it was his residential neighbor of many years, and he was appointed primarily on his personal integrity. This shows that assessment methods, not even portfolio assessment methods, will always capture all the qualities that finally will be decisive for hiring people for a specific job.

A critical point in portfolios is also the time dimension. Is experience which was acquired many years ago of the same value as recent experience? Is it worth more, less, or the same as present experience? Early experience has the advantage of being the foundation for later learning in a Dewey perspective, whereas new experience has the advantage of being in a newer context both socially and in terms of knowledge. What we learned/experienced ten years ago has a different dignity. However, if the person can still recall it today, it must have importance and be valued as part of the person’s contemporary competence, which may be useful.

4.5.8 Assessment centers

Thus far, we have not discussed much about how assessment in a professional setting is done and who is performing it. Recently, so-called assessment centers have become more common. This section deals with how assessment is organized in practice. Assessment is performed inside companies or through recruitment firms following different procedures. In spite of their name, assessment centers have nothing to do with physical buildings, but are rather an organizational phenomenon: “Assessment Centers refer to procedures for determining a person’s suitability for appointment or promotion, not to places!” (Ostell, 1996, p. 109). The concept is used for more comprehensive, objective, and job related assessments. The procedure of assessing can last for several days where observation of candidates and interaction with them are common ingredients.

According to Edwards (2005), assessment centers are now commonplace among large employers for shortlisted candidates. They offer direct assessment of candidates for demonstrable evidence of competences. Candidates gain the opportunity to evaluate the company/organization from their own perspective. Edwards examined the activities
undertaken in assessment centers by a sample of major employers (percentage equals proportion of the sample using them):

1. Interviews (66%)
2. Group exercises (66%)
3. In-tray exercises (50%)
4. Presentations (50%)
5. Abstract reasoning exercises (50%)
6. Verbal ability tests (50%)
7. Informal discussions (50%)
8. Case studies (33%)
9. Numerical ability tests (33%)
10. Solving complex problems (16%)
11. Written reports (16%)
12. Questionnaires (16%)
13. Observation tests (16%)

Edwards points out that the tests are not usually intended to test what a candidate knows in a subject sense. They are intended to test how candidates think and react when encountering new tasks/challenges and for some tests under time constraints.

Especially in the medical field there are many opportunities to assess the practices of doctors. They have specific tasks to do – real patients of flesh and blood that can be examined. Doctors can then be observed and tested for their knowledge of patient cases by being asked to diagnose patients for (a panel of) assessors. Assessors can use assessment tables, rating scales, and other measures to assess a peer doctor. The trend is to assess doctors in actual or simulated situations where doctors not only can demonstrate knowledge and skills, but also emotional intelligence, self-awareness in the context of conflict and ambiguity (Epstein & Hundert, 2002). In the management field it does not seem equally easy to make actual or simulated tests of managers. Decision situations are not so clear cut as in the medical world, where decisions are based on a more naturalistic ontology and epistemology. A peer review system is, however, possible for evaluation of colleagues over a longer span of time, which will result in a more general evaluation (Peiperl, 2001). Imagine that a manager should be assessed for a concrete decision, such as a merger or deciding to enter a new market. The outcome of such decisions can be looked upon from different time perspectives and the evaluation results could be quite
conflicting. In business there is often a contradiction between the short term and the long term – and which one to assess. It seems to be more valid to assess a manager over a lifelong career where he has a track record.

Assessment methodology is increasingly multimodal and tailored to the specific goals and context where they are used (Epstein & Hundert, 2002). This points in the direction of using different simulated test forms for younger applicants without much track record. Here it is possible to observe an applicant practicing or to discuss with him dilemma-decision types of questions. For mature applicants it seems to be appropriate to test his track record in a portfolio type of assessment framework plus to evaluate his personality by references and/or spending some time with him.

Assessment centers also exist in different forms. Björnåvold (2001), for example, talks about two schools: the school(s) of human resources management and the school(s) of assessment, where the former are the hardliners of measurements. Human resources managers are accustomed to competence measurement using CVs and sophisticated techniques for testing and self-assessment. There are, however, situations where such techniques would not give valid information. Björnåvold describes an example from USA, where Mercedes-Benz in 1993 built a new car manufacturing plant in Alabama. The Alabama region had no tradition for car production and was low in industrial competence overall. Mercedes-Benz had to recruit workers in a non-traditional way. Traditional information on knowledge and competences from diplomas and certificates was of limited value in this situation. The enterprise found that they should find generalists able to learn and they looked at criteria such as “attitudes, abilities to communicate, approaches to problems rather than predefined, non-disputable areas of knowledge” (Björnåvold, 2001, p. 79). This assessment method is very much in line with the one favored by Evan-Jones (2008), who claims that the most important things to look for is personality, because for performance in most jobs the most important thing is the willingness to learn.

“Atypical cases” create problems for assessment centers, because often non-traditional assessment tools have to be used. Learning from experience can be categorized in a similar way. Björnåvold (2001) raises the question of the validity of assessment of non-formal learning because of the tacit nature of much of this learning type. Evaluating content validity would demand precisely defined tasks to confront the learning with. Evaluating construct validity is easier as the learning could be compared with constructed
entities such as “communicative skills” or “co-operative abilities” based on indirect evidence (Deitte, 2008). McMullan et al. (2003) report low interrater reliability of portfolios that was mainly due to the highly personal nature of the portfolios. They discuss how fewer learning outcomes would heighten reliability but would hamper validity, and conclude that assessing portfolios on purely quantitative criteria is difficult. They recommend a mixed method approach of both quantitative and qualitative methods. They believe that using practitioners as assessors will increase validity as assessors’ own judgment will come into play. Maybe we will come to a point where we can claim that portfolio assessment is “the worst system – except for the alternative” to use a Winston Churchill formulation.

4.5.9 Summary and integration

This chapter has been structured around a framework presented in Chapter 3 as Figure 3.1: Comprehensive framework for assessing candidates for jobs. The focus was on competence; therefore this construct has been scrutinized. The elements of competence were found to be knowledge, skills, personality, and experience. These constructs were formed by academic learning (school learning) or by experiential learning (learning from practice). It has been seen as important to go deeper into these constructs to investigate how competence is established by individuals and ultimately why, in order to produce an assessment methodology. In doing so it is important to know what should or can be assessed. This is especially important for the population of this study: entrepreneurial academics shifting to business or entrepreneurial businesspeople shifting to academia. It is important to assess their learning throughout their career voyages. It has been illustrated in the writing that competence is looked at today as a more comprehensive construct. Now organizations/companies focus more on the real competence of individuals and not so much on how it is acquired. Less attention is now put on past achievements of academic titles and standard skills as organizations/companies increasingly demand closer fits to their job requirements. Environmental factors within technology, economics, and society have facilitated these developments.

Basically, competence is related to learning. Therefore a learning model was introduced with its three learning dimensions of content, incentive, and interaction. It was seen how these three dimensions functioned in learning cases, whether it was in academic learning or experiential learning. Experiential learning was treated in more depth as this traditionally has been more difficult to assess than academic learning. Kolb’s learning
cycle was seen as a good expression of the process of experiential learning, because it deals with getting concrete experiences which a person can reflect on and decide to repeat or change before he decides on acting again and forming a new experience. In this way the person can grow, develop, and become wiser, and even grow in integrity, because of his growth in personality. Within his profession he can be more competent. It was claimed that career shifts can enhance learning because of incentive (motivational) factors and the accumulation of experience from different careers.

The competence construct has been explained together within the process of recruitment, and it has been researched how assessment of indicators for competence could be constructed. A scale of experientiality was found to be a plausible assessment tool. Assessment of personality was discussed and models presented for assessment purposes. Some of these models are used in practice today as the basis for personality tests – for instance the model based on Gardner’s multiple intelligence, Adizes’ model of managing style, and Edwards’ indicators of key competences. Kolb’s Learning Style Inventory was briefly described too. These tests can be helpful in placing candidates for jobs in typologies of personality, but there is still a way to go in assessing candidates for competence for specific assignments.

Two assessment forms were considered: the APEL (assessment of prior experiential learning) and the portfolio. These forms are based on the applicants’ own reporting of indicators for competence. These indicators may be set up by the applicants themselves or dictated by the hiring organization. The author finds these indicator (criteria) based assessment forms relevant for assessing experiential learning and competence for specific assignments or jobs. Today organizations/companies can have very specific claims for job performance that applicants should live up to, and the APEL and portfolio methodology give the applicants possibilities for describing their competence for these specific claims. In many ways the process can be likened to the process of writing a research application or other forms of applications, in which you by different means try to convince the assessors of your suitability for the object applied for. In this way the applicants can give evidence for their competences in a much richer form than rigid standard procedures make possible. Standard procedures can be good as first approximations, but portfolio procedures go beyond these. The same is true for standard systems of personality assessment. In hiring there should be room for direct assessment of applicants for personality fit between them and employers. The next chapter will produce a methodology for assessing experiential learning for lifelong career cases.
CHAPTER 5

CONCEPTUAL MODELS FOR ANALYSIS, EVALUATION, AND ASSESSMENT

In this chapter quantitative assessment models for recruiting are constructed. Two models are developed: one quantitative assessment model aiming at prioritizing relatively few candidates, and one quantitative assessment model giving absolute scores for, typically, several applicants. The theoretical rationales behind these models are shown in the chapter through different conceptual models. Additionally, auxiliary assessment schemas for the two overall assessment models are shown.
5.1 Evaluation of teaching method

In the previous chapter, the theoretical exploration provided insight into concepts of learning, experiential learning, and lifelong learning, and several methods for assessment. In this chapter these insights will be used in order to create conceptual models for the empirical studies that will be presented in Chapter 7. Learning and experience have been key words of the theoretical part of this research and it will, therefore, be natural to look at the usefulness of different teaching and training methods for improving students’/participants’ learning. Part of the academic world deals with teaching, and if it can be argued that some teaching methods support more experiential learning for students/participants than others, they can be preferred. Equally, people who have been exposed to experiential teaching methods in their careers can be expected to have learned more or better than students/participants exposed only to more traditional teaching/training methods. These findings can be put into an assessment model and graded.

Training methods contribute in different degrees to experiential learning. As seen in Figure 5.1 the behavioral stage reaches its highest extent by field experience. The other training methods described in Figure 5.1 are substitutes for real practical experience from actual working situations. “Area briefings” are programs that prepare managers to operate in, or work with people from, a particular country. They are based on factual information that is taught to managers before departure to the country. The “culture assimilator” is a program in which trainees must respond to scenarios of specific situations in a particular country. “Sensitivity training” in this cross-cultural training context is described as a method focusing on enhancing a manager’s flexibility in situations that are quite different from those at home. Understanding oneself is regarded necessary before understanding a person from another culture (Black & Mendenhall, 1991, p. 77). The figure shows the relationship between training methods in an academic learning setting on one axis and behavior – in this case cross-cultural competence – onto the other axis, and it is claimed that you get more competent by more behavioral training methods. It is seen from the figure that traditional training methods such as lectures, books, and even case studies are quite far from the “real thing” – the practical experience of a manager. Also Gesteland (2005) points out the value of experience from the field and expatriate periods to increase competence in cross-cultural business behavior.
Something of the same thinking is behind Table 5.1. Gibb (2002) has researched how teaching methods and entrepreneurial behavior are connected. He tried to create an indicative template with a range of pedagogical techniques (teaching methods) that might be used and linked to certain recognized entrepreneurial behaviors and skills (see Table 5.1). The skills included in the table are: seeking opportunities; taking initiative and acting independently; solving problems creatively; persuading/influencing others; making things happen; dealing with uncertainty; flexibly responding successfully; negotiating a deal; making decisions; presenting confidently; managing interdependence successfully. At the other axis he has 33 teaching methods. He evaluates each of the 33 teaching methods’ (lectures, seminars etc.) ability to meet the goals of these skills on a one to three star scale. Out of 33 teaching methods, only one has a three-star marking and two thirds of the table’s entries are blank. This illustrates the difficulties with formal teaching methods in meeting the goals of teaching on a behavioral basis.
Indirectly, this tells us that academic (symbolic, verbal) learning is not so strong in an entrepreneurial behavior way. It is an appreciation of teaching methods that are near to practice. Lewin’s T-Groups with incorporation of the practice experience by the participants, Dewey’s thinking on continuation and interaction, and Kolb’s focus on experience for best learning results support this thinking.

The ideas from Gibb are both eye-openers and instrumental as the matrix contains a variety of possible combinations of teaching methods that stimulate entrepreneurial behavior and thereby experiential learning as well. Parts of Gibb’s ideas can be useful for constructing a conceptual model. The teaching methods can be seen as input and the entrepreneurial behaviors and skills as output for an experiential learning and assessment model.
5.2 Conceptual models for assessment

If we can claim that people learn more by experiential learning methods, how can we in practice link experience to learning? Gibbons and Hopkins’ scale of experientiality, which was presented earlier in Figure 4.18, can be used as a framework for assessing research data of this study (Table 5.2). The model representation as illustrated here was used in the platform case of the licentiate dissertation as a framework for case analysis and evaluation. Here it is used for model construction purposes as the philosophy behind Gibbons and Hopkins’ scale goes into Table 5.3. Here the inside of Table 5.2 is empty, but sample cases will be evaluated in Chapter 7 based on a modified version of this model.

Table 5.2: Gibbons and Hopkins’ scale of experiential learning combined with the author’s experiences as described in platform case, Graff (2007, p. 50)

<table>
<thead>
<tr>
<th>Author’s experiences (Platform case)</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Stimulated</td>
</tr>
<tr>
<td>Education</td>
<td></td>
</tr>
<tr>
<td>Market consultancy, Masius</td>
<td></td>
</tr>
<tr>
<td>Lectureship</td>
<td></td>
</tr>
<tr>
<td>Training program development</td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td></td>
</tr>
<tr>
<td>Market research at foreign markets</td>
<td></td>
</tr>
<tr>
<td>Examination board</td>
<td></td>
</tr>
<tr>
<td>Exam commission</td>
<td></td>
</tr>
<tr>
<td>Managing</td>
<td></td>
</tr>
<tr>
<td>Board member</td>
<td></td>
</tr>
<tr>
<td>Mentorships</td>
<td></td>
</tr>
<tr>
<td>Book reviews</td>
<td></td>
</tr>
<tr>
<td>Own Consultancy Company</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
</tr>
<tr>
<td>PhD courses</td>
<td></td>
</tr>
</tbody>
</table>

Source: Adapted from Gibbons and Hopkins (1980)
In Table 5.2 it will be possible to link respondents’ experiences with experiential learning by assessing their experiences on the ten-step experiential scale at the top of the table. (Please look at Figure 4.18 for more detailed information about the scale.)

The three models presented so far in this chapter will be used as input for a conceptual “mother” model (Table 5.3) for evaluation of experiential learning over the course of a lifetime. It is derived from the Illeris model, Figure 4.3 (Illeris, 2007), the Black and Mendenhall model, Figure 5.1 (Black & Mendenhall, 1991), the Gibb model, Table 5.1 (Gibb, 2002), and the Gibbon and Hopkins model, Table 5.2 and Figure 4.18 (Gibbon & Hopkins, 1980).

The first model to include is the Illeris model, as it is regarded as a general model of learning and a model that is very useful for illustrating experiential learning. A time dimension is added and important learning periods in the lives of individuals can be discovered and be labeled eras. Eras in the model are regarded as dependent variables and the activities a person has performed as the independent variables. People typically perform certain activities at certain points in time (eras). The reason why it is labeled “mother model” is that it comprehends the thinking of the scholars used to create the model. These scholars have tried to understand and describe how experiential learning takes place and done so very concretely. This is also the author’s aim. His ambition is to create an assessment methodology, and tools that make it possible to assess experiences of people over a lifelong career for career shift purposes. Therefore the time dimension is important in the model of Table 5.3. It might seem courageous by the author to try to include so many models into the same time framework, but it illustrates the progression of means of learning as life is lived and it enables individuals to behave at a still higher order – call it the behavior of a more experienced or wise person.
Table 5.3: Teaching and training methods’ influences on experientiality in a lifelong learning context with key words. The conceptual “mother” model

<table>
<thead>
<tr>
<th>Illeris (2007) Dimensions:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>Incentive</td>
</tr>
<tr>
<td>Time</td>
<td></td>
</tr>
</tbody>
</table>

### I. Input

<table>
<thead>
<tr>
<th>Black and Mendenhall (1991) (Training methods)</th>
<th>Factual</th>
<th>Analytical</th>
<th>Experiential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lectures, Books, Case studies</td>
<td>Critiques, Searches, Critical incidents</td>
<td>Debates, Interviews, Simulations, Evaluations</td>
<td>Mentoring each other, Games, Organizing events, Competitions, Audits</td>
</tr>
<tr>
<td>Black and Mendenhall (1991) (Focus)</td>
<td>Observational</td>
<td>Behavioral</td>
<td></td>
</tr>
</tbody>
</table>

Source: Graff (2007, p. 29)
The content of Table 5.3 describes in principal how an experiential learning process could take place. Time is important, because an individual is under the influence of what Dewey called continuity and interactivity. Your learning builds on prior learning and it interacts with the environment at a given time. Different training methods have influenced the individual through time and they continue to do it in different ratios. What is important is that the individual really does experience the more advanced training methods in his life (for instance field experience) to achieve a still higher level of learning. Incentives also differ throughout life. In periods no incentives are felt whereas they are plentiful in other time periods. Therefore an individual will often talk about eras of his life – triggered by environmental changes or organizational/private incentives.

Table 5.3 has an input portion consisting of different teaching tools that the individual can be faced with. It also has an output portion, which describes the behavioral/learning effect of the inputs. The entrepreneurial behaviors from the Gibb (2002) model are allocated to the places where they are most characteristic, but many of the entrepreneurial behaviors fit into other eras too. The same is valid for the Black and Mendenhall and Gibbons and Hopkins measures of behavior in the table. Learning in any era happens with a mix of tools and behaviors. The experiential learning model is comprehensive because individuals may have different experiences of teaching and learning throughout life. There are many expressions of learning situations and these can usually be typified into the model structure. It can be argued that there is no automatic parallel in learning advancement and time. An intelligent person can very early in life perform brilliantly in a field. For most people, however, more advanced teaching methods, for instance cases, mentoring, or teaching others, come in later in life as a result of prior learning and the individual’s extended experience. They then also add to the person’s experience as a stepping stone and thereby form a jumping off point for later careers.

The conceptual “mother” model will be streamlined into the three Illeris learning dimensions, as they contain learning in a simple recognizable form suitable for the empirical research performed in the autobiographical platform case and for the sample cases (see Table 5.4). The dimensions contain the content, incentive and interaction from case persons’ learning experiences whether they are obtained from schools, courses, or from practice. Respondents are expected to be able to identify eras in their professional lives and describe their activities that have been extra important for their learning.
Table 5.4: Dimensions in an experiential assessment model
The conceptual model of this research

<table>
<thead>
<tr>
<th>Dimensions:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td></td>
</tr>
</tbody>
</table>

The other content of Table 5.3 is not forgotten, but it has primarily served as an *illustration* of how the models can be linked together in a temporal manner and their outcomes achieved throughout life. Both the input and the output parts of Table 5.3 contain incentives and interaction implicitly. A lecture can, for instance, be an incentive for an individual to study further into the subject of the lecture and as a participant in the lecture he interacts with fellow participants and with the lecturer. The outcome “mastery” can also give incentives for an individual to further study and further interact with an audience. Incentives and interactions are, however, very individual. What for one person will be motivating, will for others be the opposite. Interacting in one context can be a good thing for one person but the opposite for others. Therefore, it is up to individuals themselves (respondents) to define and describe what have been incentives and interaction opportunities for them throughout life.

It will be seen from the model that an individual’s learning operates in a context of content, incentive, and interaction at any given time. Typically an individual will be engaged in assignments – the *content* dimension – of a certain longer duration connected to a project or a job. They often form a period in the individual’s life where he is pursuing a career until an *incentive*, for example an environmental occasion, sends him in another direction. Individuals’ lives can, therefore, often be allocated into life phases or *eras*. All activities are performed in an environment and you learn by *interacting* with that environment (Dewey, 1938; Illeris, 2007). The environment has many dimensions, but the most important ones in the context of this research are the business environment and the cultural environment. The incentives are partly aroused by environmental influences – partly by organizational and private influences. The content dimension describes the actual experiences the respondents have had – in this context primarily from assignments and job functions.
Respondents can be evaluated with the conceptual model of Table 5.4 in the framework of the dummy Table 5.5 below. The content dimension has been developed as a result of the analysis for the platform case. The number of content-factors has been reduced from 15 to six to be more operational as it could fit into the experiences of the sample respondents. They are all people who have shifted from academic careers to business or businesspeople who have shifted to academia, so the factors fit them as they did the platform case. By interviewing the respondents, it is possible to identify eras of their lives. The “Era” columns are labeled in the columns at the bottom of the table to show that they are functions of the professional activity in the specific era and that a time can be allocated to the era.

Table 5.5: The conceptual model for putting in respondents’ data

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>• Prior education</td>
<td></td>
</tr>
<tr>
<td>• Lecturing</td>
<td></td>
</tr>
<tr>
<td>• Consulting/Executive jobs</td>
<td></td>
</tr>
<tr>
<td>• Training/counseling</td>
<td></td>
</tr>
<tr>
<td>• Authoring</td>
<td></td>
</tr>
<tr>
<td>• Research</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
</tr>
</tbody>
</table>

The platform case using the framework of Table 5.5 gave evidence for the research question: “Is it possible through theories or experiential learning and experiential assessment methods to empirically test whether learning has taken place?” The
framework can be used on all people who satisfy the conditions of the population as defined. It could be used in a job application situation where several candidates are applying for the same assignment or job.

To give a snapshot of a candidate’s life course, Figure 5.2 is constructed. It shows the “footprint” of the candidate in two dimensions over his professional life. Lifelong learning is a function of learning throughout life. Lifewide learning focusing on how learning is acquired, from academia or from business. The figure is inspired by the Swedish National Agency for Education (2000), which placed lifewide perspective on the x-axis (formal learning – informal learning) and lifelong perspectives on the y-axis (from birth to death). Boström (2003) used it in her dissertation on intergenerational learning, and it is found to also fit with this study’s theme of assessing lifelong learning.

![Figure 5.2: The “footprint” Lifelong and Lifewide learning for Candidate X](image)

Source: Adapted from Boström, A-K (2003) and modified by the author
All cases will be evaluated as in Figure 5.2. As mentioned, it has two dimensions. One is for lifelong learning, showing age. You learn while you live. The other dimension is lifewide learning, showing in what context you learn throughout life. This dimension has two subdivisions: learning from academic positions and learning from business positions. So in a way it is a Christmas tree with a spine (age) on which you put on your learning. “Blue bells” (left hand side) are learning from academic positions and “red bells” (right hand side) are learning from business positions. They are placed on the tree corresponding to the times they were acquired. The “footprint” gives an immediate impression of a candidate’s professional life, as in which occupation he has spent his time. The black fields indicate that the candidate has spent (nearly) all his time in this occupation. A striped shading means he spent part of his time in this occupation. All “footprints” start on the “Academic life” side at birth. This is a minor misrepresentation since people do not have schooling for (approximately) the first six years of their lives, but as a matter of simplicity this way of illustration has been chosen. The sample figure shows a candidate with schooling up to his 25 years of age. He then went into a business occupation for about five years, but left for a mixed career in academia and business for approximately the next 30 years. In his 60th year he accepted an early retirement and focused on business again, after which his primary source of learning has been experiential.

It should be noted that experiential learning for a candidate happens in both occupations. A university professor acquires experiential learning from performing his profession, although it is performed in an academic environment and the output of his work is overwhelmingly academic. Lecturing over years gives experience; writing journal articles gives experience; other scholarly activities give experience. Nevertheless, there are significant differences between the two worlds of academia and business. In academia, practitioners are working with representations of the reality of the business world. In business, practitioners are closer to the reality of the business world where they see outcomes of decisions concerning real things: products and services.

Jarvis (2007, p. 1) in particular has researched lifelong learning and he puts weight on the person experiencing social situations throughout life that transform his personality. Being in academia usually heightens a person’s academic learning, and bringing this to business life will most certainly improve his performance there. Meanwhile, a person with experience from business life going into academia will have a clearer picture of which and how theories will work in practice. Also Kolb (1984) has described how people grow and develop throughout life by interacting and transacting with the world, and it must be assumed that interaction between a life in academia and a life in business will form a
more holistic and integrated person, because he has experienced both worlds. Illeris (2007) talks about learning spaces and recognizes the learning from both the academic learning space and the business learning space, and he sees good ideas in combining them (p. 232).

5.3. Recruitment models

The “footprint” model is good at getting a quick look at several candidates applying for a job. It is possible to screen out candidates who have a less than ideal profile of positions in academic life and business life. The next problem to solve is how to prioritize shortlisted candidates applying for the same job. A model is developed for this purpose as Table 5.6. It is an importance-performance table of shortlisted candidates where you typically have three to five candidates to choose from. The procedure of assessment is:

- Define assessment criteria.
- Weight assessment criteria according to importance for the position.
- Assess each of the shortlisted candidates by distributing 100 points per candidate in accordance with their meeting the criteria. This is a relative assessment where the candidate who best meets the criteria gets the most of the 100 points and the candidate who least meets the criteria gets the least of the 100 points.
- Importance weight is multiplied by each candidate’s score and summed up for each candidate to get his total score.
- The candidate with the highest total score should be the most competent candidate according to the criteria.

Table 5.6: Importance-performance table of shortlisted candidates

<table>
<thead>
<tr>
<th>Quantitative Recruitment Model I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Importance of criterion (weight)</td>
</tr>
<tr>
<td>30 Content</td>
</tr>
<tr>
<td>10 - Prior Education</td>
</tr>
<tr>
<td>4 - Lecturing</td>
</tr>
<tr>
<td>4 - Consulting/Executive positions</td>
</tr>
<tr>
<td>4 - Authoring of books</td>
</tr>
<tr>
<td>4 - Research</td>
</tr>
<tr>
<td>30 Incentive</td>
</tr>
<tr>
<td>40 Interaction</td>
</tr>
<tr>
<td>100 Total</td>
</tr>
</tbody>
</table>
In Table 5.6 the assessment model is illustrated by a fictitious case. The importance criteria illustrate the three learning criteria: content, incentive, and interaction. The content criterion was detailed in the conceptual model, Table 5.5 and put into Table 5.6 for evaluation purposes. Scores for the candidates are fictive to illustrate the arithmetic of the assessment model. Importance weights are multiplied with performance scores for each candidate and summed up. Candidate X gets 30.3 total scores (0.10x40 + 0.04x33 +0.04x20 + 0.04x40 + 0.04x20 + 0.04x45 + 0.30x30 + 0.40x20). In this example candidate Y gets the highest overall score of 37.6 and should be the chosen candidate.

It is very important that

- The criteria are the decisive ones for performing the job
- The weights are allocated in accordance with importance for the job
- All criteria are included
- The data delivered by the applicants are exhaustive and correct

To meet these claims, the criteria can be detailed further as shown in Tables 5.7 and 5.8. When assessing the candidates on the criteria, you have their relative position to put into Table 5.6. To illustrate this, the assessment of the three candidates’ position on “Authoring of books” is shown in Table 5.7. For instance, it shows that the books authored have no relevance for the position for Candidate X, whereas they are highly relevant for Candidate Y and to a lesser extent for Candidate Z. Summed up to 100, the “Authoring of books” criterion can be directly put into the overall assessment model of Table 5.6 above.
Table 5.7: Detailing of assessment criteria from Table 5.6
Quantitative Recruitment Model I (Expanded)

<table>
<thead>
<tr>
<th>Detailing the criteria:</th>
<th>Points (relative distribution)</th>
<th>Candidate on criterion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>- Prior Education</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o PhD</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Master’s Degree</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Bachelor’s Degree</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Diplomas</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>- Lecturing:</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Lectured in subjects relevant for the job?</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>o Quality of lecturing</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Years of lecturing</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>- Consultancy/Executive positions</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Consultancy/Managing positions</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Years in managing positions</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Foreign contacts:</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>▪ Duration of stays abroad</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>▪ Expat experience</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>▪ Relevant countries for the job</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>- Training/counseling</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Program manager</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Education programs</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Study adviser</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Subject programs</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>- Authoring of books:</td>
<td>100</td>
<td>20</td>
</tr>
<tr>
<td>o Sole author</td>
<td>30</td>
<td>5</td>
</tr>
<tr>
<td>o Co-author</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>o Quality of book</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>o Relevance for job</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>- Research:</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Number of first author journal articles</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Number of co-author journal articles</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Quality of articles</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Articles with relevance for the job</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Prestigious journals</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

Another schema will be developed for assessing candidates, as shown in Table 5.8. It is a schema illustrating the three learning criteria (content, incentive, and interaction) of a specific candidate, and the importance of the environment for his learning. Environmental factors can be significant for a person’s incentive and interaction throughout life.
There are two assessments: one for the level of these factors and the other for their importance over time. A candidate, for instance, can have started at a medium level, but the learning dimension throughout his life voyage has either increased, remained stable, or decreased.

For the example in Table 5.8, the candidate started at a high level on all three learning dimensions with moderate environmental influence. Over his life career he has maintained his high level of content, but incentives and interactions have increased, as have environmental influences on his career. The data for the evaluations are summarized in the framework of Table 5.5 through a data collection process, for instance the applicants’ own description, interviewing by the hiring organization, or other means.

Table 5.8: Level of the three learning dimensions and their importance over time plus the importance of environmental factors

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance over time</td>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 5.8 especially puts focus on the incentive and interaction learning dimensions over a life course. At a given point these dimensions can be low or high, but they can develop over time. Both learning dimensions will influence the content learning dimension, as it must be presumed that motivated and interacting people will influence the content learning dimension positively. The assessment of these dimensions will be taken from the background data of the candidates’ reporting or by interviewing them. The summary is put into Table 5.5. Table 5.8 will help in the quantitative assessment on the incentive and interaction dimensions that ultimately end up in Table 5.6, the importance-performance table.

An alternate way to assess candidates than the “relative” model, the “importance/performance” model of Table 5.6, is an “absolute” model. This model is constructed with the competence model in mind (Figure 4.15). Assessment of individuals has to be set up against objectives by criteria custom-made for those objectives. A person cannot be absolutely competent. His competence must be measured towards specific
objectives to give meaning. With that in mind a model will be constructed, which is shown in Figure 5.3.

![Figure 5.3: Final integrative assessment model for hiring candidates for a specific job position](image)

The final framework for assessment of candidates for jobs

For the assessors’ part, the criteria they look at should be as objective as possible. Their role is primarily administrative, but for assessing some criteria, assessors should be professionals in order to comprehend the data as well as possible and to make the assessment as valid as possible. Assessing personality qualities should be the role of the superiors for whom the applicant shall be working. Assessment of personal characteristics are more assessor dependent than many other criteria, influenced by the wish to have a good personal fit between the applicant and those he will work with.

A professorship in Marketing offered by USBE, Umeå University, in 2006, was announced as seen in Figure 5.4. It will be used to illustrate the assessment model.
Professor in Marketing

The position is open for an experienced researcher with a PhD in Marketing also exceeding the requirements for the Swedish "docent" title.

The eligibility criteria for employment as full professor are scientific as well as pedagogic proficiency. The scientific proficiency should be demonstrated through independent research that significantly extends the qualifications required for the Swedish docent title. Documented skills in scientific leadership are of importance. Skills in developing and leading research and personnel, both within and outside the organization, and in the communication of research will be considered, as well as personal suitability. Documented collaboration with other researchers as well as previous success in finding funding for research projects are merits. Creating, maintaining, and developing networks within the corporate world are likewise valued aspects when evaluating the candidate. The applicant must have a pedagogic training relevant for the tasks associated with this position. The examination of pedagogic proficiency shall refer to planning, execution, and evaluation of teaching as well as advisory activities and examination.

The candidate should have a broad marketing research background. In examining the scientific proficiency special attention will be given to knowledge within the fields of consumer behavior, service marketing and relationship marketing, business-to-business marketing, and/or international marketing.

The position is a permanent appointment (fulltime/continuation). We expect a high level of opinion and written English. Swedish is positive, but not considered a requirement when applying for the position. The professor is expected to be actively present at Umeå University of Business for this position.

The salary will be based primarily on the scientific and pedagogical qualifications of the applicants, with special emphasis on scientific proficiency. The order of prevalence in the application of the different selection criteria is however not absolute. A combined consideration of all grounds of assessment could result, for instance, in an applicant with superior scientific qualifications being marked higher than a candidate with adequate scientific qualifications who is considered less qualified pedagogically.

Eligibility and assessment criteria are found in Chap. 4 of the Higher Education Ordinance. For further information, please visit www.uu.se.

Gender equality will be considered according to Swedish gender equality regulations. The University/agency equality policy, and the University's gender equality plan.

The application must be written in English. Applications should include a CV and a short summary of research activities and publication record. The evaluation will be based on the following documents:

- A short text (max. 2 pages) on the scientific and pedagogic qualifications and related activities that are of importance for the position.
- A list of publications and other activities to be considered for assessment.
- A list of at least 10 research publications that are considered the most important scientific contributions.

Applications are to be submitted electronically by 10 April 2002 to the Registrar, Umeå University, SE-901 87 Umeå, Sweden.

We look forward to receiving your application!

Figure 5.4: Announcement for a Professor position in marketing
From the announcement the following assessment criteria can be derived and adapted to the assessment framework in Figure 5.3 above:

**Formal, mandatory requirements:**

PhD in marketing, Minimum docent title

**General criteria**

- Scientific proficiency (significantly exceeding docent position).
- Pedagogic proficiency required for the position.
- Skills in developing and leading research and personnel both within and outside the organization.
- Skills in communication of research both within and outside the organization.
- Documented collaboration with other researchers.
- Previous success in finding funding for research projects.
- Creating, maintaining, and developing networks with the corporate world.
- Spoken and written English.
- Swedish language positive, but not required.
- Actively present at USBE.

**Specific criteria**

- Formal pedagogic training relevant for the tasks associated with this position. (Planning, execution, and evaluation of teaching. Advisory activities and examination.)
- Broad marketing research background.
- Special attention will be given to knowledge within the fields of consumer behavior, service marketing, relationship marketing, business-to-business marketing and/or international marketing.

**Personality criteria**

- Attitude.
- Behavior.
- Character.

The assessment criteria should be formulated by different stakeholders and approved by the assessment committee. Behind the formulations, more specific operational criteria can be formulated. In this case, it could be the pedagogical specialists at University Pedagogical Center (UPC) that could formulate criteria for pedagogic proficiency. For the specific criteria, the Dean in cooperation with the marketing group at USBE could set up criteria. There could be other stakeholders who could have an interest in setting criteria for the position. In this case, it could be employer organizations or industry societies on the national or regional level with criteria for business experience. Points should be allocated to every criterion as maximum points. Concrete assessment will show how many of the maximum points a candidate can get. There can be a need for quantitative assessment of the personalities of candidates as well. The format for assessing personal criteria is shown in Table 5.9.
Table 5.9:  Personality criteria. ABC model (Attitude, Behavior, and Character) for shortlisted candidates

Name: Candidate X

<table>
<thead>
<tr>
<th>Weight</th>
<th>0.25</th>
<th>0.50</th>
<th>0.75</th>
<th>1.00</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.5</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14.0</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
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<td></td>
<td></td>
<td></td>
<td>14.0</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>3.0</td>
<td>1.5</td>
<td>12.0</td>
<td>19.0</td>
<td>35.5</td>
</tr>
</tbody>
</table>

Note: Oxford Dictionary of English 2003:

*Attitude*: A settled way of thinking or feeling about something

*Behavior*: The way in which one acts or conducts oneself, especially towards others

*Character*: The mental and moral qualities distinctive to an individual

Source: Inspired by Evan-Jones (2008)

With ticking in the schema immediately after the interview, this seems to be an efficient tool for assessing applicants’ personality. The philosophy guiding the assessment should be the person-organization fit (PO fit) paradigm with consideration of the applicant, the job, and organization he shall fit into. Personality assessment can be made quantitative too by allocating weights to the model. This is done in Table 5.9, where 50 points are set as the maximum and a hypothetical assessment of a candidate is done. In this example he is assessed to a total of 35.5 points. Personality is important for job performance. It is a criterion that especially points to the future, because “most people can learn 60% of the work assignments within a field, if they have a good personality” (Evan-Jones, 2008).

For doing the overall quantitative assessment of candidates’ competence for a position, Table 5.10 is constructed. In Table 5.10, selection criteria have been detailed and weights (points) been allocated. Putting in criteria is a very important function for the assessment process, because only criteria that are formulated will be taken into consideration. It is possible to give the criteria importance weights so as to design the assessment according to the needs of the position. That it is difficult to describe a position is another story, but
trying to do it explicitly is an exercise in itself that can force decision makers to be clear in their own minds about the quality dimensions of the position.

Table 5.10: Assessment criteria for position as Marketing Professor
Quantitative Recruitment Model II

<table>
<thead>
<tr>
<th>Formal, mandatory requirements:</th>
<th>Max points</th>
<th>Detailing the criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>- PhD in Marketing</td>
<td></td>
<td>If not: Rejection</td>
</tr>
<tr>
<td>- Minimum Docent title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Actively present at USBE</td>
<td></td>
<td>At least one third of every year</td>
</tr>
<tr>
<td>- Spoken and written English</td>
<td></td>
<td>At least level 4 on an ascending scale required within a year</td>
</tr>
<tr>
<td>- Formal pedagogic proficiency</td>
<td></td>
<td>For instance Högskolaprov or equivalent pedagogic merit required within a year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General criteria</th>
<th>60</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Skills in developing and leading research and personnel both within and outside the organization</td>
<td>20</td>
</tr>
<tr>
<td>- Skills in communication of research both within and outside the organization</td>
<td>10</td>
</tr>
<tr>
<td>- Documented collaboration with other researchers</td>
<td>5</td>
</tr>
<tr>
<td>- Previous success in finding funding for research projects</td>
<td>15</td>
</tr>
<tr>
<td>- Creating and maintaining and developing networks with the corporate world</td>
<td>5</td>
</tr>
<tr>
<td>- Swedish language positive, but not required</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specific criteria</th>
<th>40</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Pedagogic training relevant for the tasks associated with this position (Planning, execution, and evaluation of teaching. Advisory activities and examination)</td>
<td>15</td>
</tr>
<tr>
<td>- Knowledge within the fields of consumer behavior, service marketing, relationship marketing, business-to-business marketing and/or international marketing</td>
<td>25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personality criteria</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Personal suitability*</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>

**Total score**

*Note: Oxford Dictionary of English 2003:
Attitude: A settled way of thinking or feeling about something
Behavior: The way in which one acts or conducts oneself, especially towards others
Character: The mental and moral qualities distinctive to an individual*
It appears from Table 5.10 that 100 points are the maximum to allocate to the general and specific criteria and 50 points are valued for the personality criterion. It is a management decision to state maximum points and it seems to be a well-designed way to express the value philosophy of the decision makers. There can be different evaluations of these things within the management team, but this functions as a discussion opportunity for them. It seems that the ideal way to do the assessment is to publish assessment criteria for potential applicants and let them come up with the relevant proofs for meeting the points. In this way the assessment committee puts much of the work on applicants and eases their own workload by bringing in the structure that applicants have to follow.

The final integrative model in Figure 5.3 indicates that an assessment committee handles the formal, the general, and the specific criteria. Some committee members could be administrative personnel, but probably professionals within the field will also have to do much of the assessment, as there will be qualitative assessments of how many points to allocate based on the extent to which candidates fulfill the criteria. Evaluation of the personality of applicants should be done by superiors for the job position. They are the people who will work with the chosen applicant, so they should match in chemistry. It could be foreseen that out of ten applicants assessed, for instance, three of them will go further for personal evaluation. In the example of Table 5.10, a rather high maximum point number is allocated to personality assessment. It is up to management to decide, but in this example personal qualifications count much. The concrete points to put into Table 5.10 for personality are assessed by Table 5.9.

5.4 Summary

Based on the theoretical explorations of Chapter 4, this chapter has built models and tools to assess candidates for assignments and jobs. The chapter took its departure from models of training methods that highlighted experiential and entrepreneurial training methods. In later assessment of experiential learning, this is essential knowledge, as candidates from academia can have performed experiential learning methods in varying degrees. Similarly, businesspeople in their education can have been exposed to experiential and or entrepreneurial training methods in varying degrees.

The logic of these models was transferred to the conceptual model of this study, which is based on Illeris’ three learning dimensions. A time dimension was added, and it was
claimed that there is some progression in experiential learning of people as they perform their profession over time. The conceptual model was further built upon so it would be suitable for inputting data from respondents, as it was workable in the platform case.

Two other models were proposed for assessing candidates for jobs.

One of the models built on the Illeris framework of learning dimensions: content, incentive, and interaction. The candidate should be assessed for each of those dimensions on a three point scale: high, medium, and low (Table 5.8). These dimensions should also be assessed for their importance over time in the candidate’s learning by scaling on three points: increasing, stable, or decreasing importance. A fourth dimension was added, environment, as the environment can have great importance for a candidate’s decision to change careers. This assessment model gives an immediate overall impression of a candidate’s status.

The other model presented was the “footprint,” Figure 5.2. The aim of this model was to give an instant impression of the candidate’s career. Where has he been engaged throughout his life in the two professions of interest in this study, academia and business?

Two models were proposed for recruitment purposes: Quantitative Recruitment Model I, which is suitable for prioritizing shortlisted candidates, and Quantitative Recruitment Model II, which is a model that gives candidates absolute scores from the assessment process. In principle, Model I does not secure absolute competence, as it is a relative model based on ranking people. It seems, however, to be good in cases where an employer must chose between a few well-qualified candidates. Model II gives direct assessment of the criteria, and therefore an absolute assessment of competence. This model can handle several applicants because of its absolute nature. A special format was proposed for assessing personality criteria, as a person-to-person assessment is perceived necessary. Especially if more assessors are involved, it might be an advantage to make personality assessment quantitative too, which is why the model was made quantitative. Assessment Model II was made instrumental from the conceptual model of assessment based on groupings of criteria set up by an employer (Figure 5.3).

All in all, the author’s ambition has been to propose an assessment methodology that can be useful for assessing candidates – especially mature candidates who wish to shift careers. The two Quantitative Assessment Models I and II can, however, be used for more general recruitment purposes too. The next section will deal with the research methodology of this study and how to collect information for the conceptual models.
CHAPTER 6

RESEARCH METHODOLOGY

This chapter deals with considerations about data procurement for the assessment models described in Chapter 5. It starts with some basic assumptions for the research and points of departure. An empirical research model is introduced, and this is used as the frame of reference for data collection. After this, the sampling procedure for the study is announced and the interview procedure described. The chapter ends with ethical considerations.
An objective of this study is to produce experiential learning assessment techniques for evaluating executives in different job setting situations. Moreover, it aims to highlight experiential learning in a lifelong perspective, i.e. a period that covers larger parts of the careers of professionals. As has been shown in the theoretical part of this study, the concept of experiential learning contains different time dimensions. Experiential learning can take place in direct real-life situations, which resembles action learning. However, experiential learning can also be studied in relation to a longer time perspective, for example in relation to lifelong careers. It is the latter form that needs more attention. This objective is justified on the following basis. Current demographic trends in many European and North American countries suggest that individual professionals will retire later and, partly as a result of the transformations in the global economy, will seek opportunities in several professional fields requiring different capabilities and educational options. This trend also suggests that professionals will pursue additional degrees (credentials) later in their professional careers. Consequently, the previous experiences, education, and publications efforts, if any, may have to be evaluated (assessed). It is anticipated that the experiential learning assessment methodology will have to be applied to many different situations in the professional life of an individual.

6.1 Basic assumptions and points of departure

Within the research environment at Umeå School of Business (USBE) there has been some tradition for qualitative research although the majority of research over the years has been quantitative. For the purpose of this study the character of the methods will be qualitative. The basic assumptions and points of departure are that individuals construct their own knowledge of reality and that all knowledge of reality must be considered in a context. This means that knowledge about reality is formed in the culture, the time, and the context of the object studied. The methods chosen for this study are important for the value and character of the results. Epistemologically, the character of this study is therefore rather ideographical, which means that the interest for the unique and specific stories of individuals is focused upon. It resembles what Nylén (2005) describes as naturalistic research. The knowledge about reality is made up of human constructs and the researcher also takes part in that construction. In accordance with the characteristics of naturalistic research, the empirical data that is useful for the purpose of this study can be gained through interviews. In the research for the licentiate dissertation that precedes this research an autobiographical study was used. It produced a platform case that this dissertation uses as a background for interview studies with important “agents” or
professionals in the academic and business fields. For both studies the narrative (storytelling) approach has been used as a guiding inspiration.

Narration/narrative is a “discourse that is designed to represent a connected succession of happenings” (Webster’s Dictionary). Narratives can be used as a research method to give meaning. People tell stories to give meaning. What is told has to give meaning for those who listen to it. Otherwise they don’t understand it. Stories with meaning often contain a form of truth. The truth is often better perceived through stories than through sterile academic lecturing, because stories are concrete and often have temporal meaning that is better understood than an explanation of why something happens (Alheit, 2005). Something gives meaning when we understand it. To tell something through a story is to give it a recognizable form. That is why stories are good at making meaning.

Alheit (2005) introduces a journal article like this: “This paper argues that there is no other way to describe history, and particularly the personal life history of people, apart from in the form of a narrative.” This quote sounds reasonable. People know their own lives best and no structured interview can capture the scenery and events in a life as the person who has lived it can by telling his own life story.

Downing (2005) suggests narratives in researching entrepreneurship. He distinguishes between storylines, emplotment, and narrative structuring. Storylines are emotionally resonant stories that are remembered and repeated. Emplotment is a largely unconscious process of iteratively “fitting” aspects of storylines into tacit plots with an expected pattern and conclusion. Narrative structuring is the process by which plots that have been tacitly selected are developed by elaborating and contextualizing the structure. He suggests a figure such as Figure 6.1.

Figure 6.1: Narrative and dramatic processes amongst entrepreneurs and stakeholders
Source: Downing (2005, p. 194)
The process of storytelling by entrepreneurs could be that storylines are formed by the individual’s perception of his achievements. This perception is formed through the narrative structure and dramatized in the emplotment in an unconscious way. It is typically when interviewing successful entrepreneurs that they often have “canned stories” – storylines – that are repeated whenever interviewed. Originally the entrepreneur elaborates upon these storylines as the causes of his success by narratively structuring his experiences. The “reason why” is formed in the (unconscious) emplotment where the entrepreneur brings in his own values and beliefs. Interviewers must be aware of the coloring of information that takes place in the emplotment and try to probe the respondent to reorganize the emplotment and come up with “updated” responses that have not yet been formed into storylines.

“What is central here is that the self-understanding of the late-modern person is held together by his/her perception or narration of his/her life story. The narration is neither a precise nor a truthful account of the actual life course but precisely the history of the life course that the person in question has developed, the constant interpretation and attribution of significance one assigns to events and contexts which one subjectively finds important for the life course and the current situation – in the same way as the identity is a more or less coherent entity which, however, constantly develops and is reinterpreted.” (Illeris, 2007, p. 141).

Brott (2001) has used the storied approach in career counseling where she explored the client’s world through story development. The client and counselor collaboratively co-construct, deconstruct, and construct life stories. Story development embraces the client’s past, present, and future life experiences that are related to life roles (i.e., family, student, worker, leisure, and community). Quantitative and qualitative data are woven into the client’s story as the symbols or meanings that call for the researcher’s further exploration. Used in a counseling context the storied approach helps clients in career development. In this research the storied approach can be used as an analytical method to grasp a person’s experiential learning. This can be done by using an unstructured interview form with a questionnaire framework aiming at focusing on the central themes of this study, and letting the respondents reflect and respond on these themes in cases where they do not by themselves cover them.
Some colleges and universities offer credits for experiential learning based on portfolio assessment. A portfolio is submitted for evaluation to an appropriate academic department. A faculty evaluator reviews the portfolio and, if college-level learning is demonstrated, approves the granting of credit. At Pace University, USA, the portfolio consists of a folder of information consisting of a résumé, an autobiography and narratives, which demonstrate how the student’s learning applies to specific coursework. Documentation of learning is included and serves as the objective, factual, tangible evidence, which validates the student’s narrative statement or description of his learning (Pace University, 2008).

In this research the storytelling method seems appropriate. Elements from the Storied Approach can be used implicitly, as this method can be linked to life experiences. Bodin (2000) used case stories too in his doctoral dissertation. He used a two-step approach with a platform case as the first step and three additional cases as the second step. He found this method good at making new knowledge applicable in a broader sense. By this way he found that the researcher can contribute by exploring/generating new theories in order to share the findings with others (p. 82).

This study is also explorative with the aim of developing an assessment methodology in a specified field. The methodology of this study or part of it might be picked up by others for use in related or different fields.

Rae (2000, p. 156) used a narrative research method for people in the process of entrepreneurial emergence to make sense of their learning. He writes: “It is subject to a pragmatic test in that, if people find it useful and applicable to their learning, then it has validity.” Foss (2004) used the autobiographic method by listening to a 42-year-old female entrepreneur who had started a theater 10 years earlier. He viewed the story as the teller’s identification of central elements in her life that were important for her to share. Those elements often represent breakpoints in a person’s life. “In transcribing the first interview I searched for underlying themes related to transitional points in her life course. I followed Riesman’s (1993) guidance and structured the narrative ‘from the inside,’ from her meanings encoded in her talk. This strategy privileges the teller’s experience” (Foss, 2004).

Learning is a process where one observes representations of things in the environment and perceives and remembers them. We want, however, the learning to interact in the
transition from one stage to another in a coherent way if we are to talk meaningfully about experiential learning. Individuals in their discourse identify to themselves what has been significant in their learning. Reality is, so to say, constructed in their stories and no absolute truth exists.

Figure 6.2 illustrates an empirical research model. Based on a platform case this research should be able to describe, analyze, and evaluate the professional life of a person (X’) in order to infer that his competence meets or exceeds a certain level of learning in the field (Y’). This is a construct that the research tries to provide evidence for by operationalizing the construct. The scores are the outcomes of the measures of the independent variable X (experiences) and the dependent variable Y (outcome of experience).

Figure 6.2: Empirical research model
Source: Schwab (2005) p. 14

Line (a) represents a causal conceptual relationship of the belief that relevant and consistent experience (independent conceptual variable) in a field can influence a person’s competence (dependent conceptual variable) in that field. The validity of this hypothetical relationship is supported by collecting information in an operationalized form (d), which in this research is empirical descriptions of the knowledge and achievements of the respondents. Line (c) signals a causal relationship between X and Y. Internal validity between them cannot be established with certainty, which is why (c) line
is broken. The same is valid for (a) on the conceptual level. It is, however, possible to assess the internal validity based on three criteria (Schwab, 2005, p. 15):

1. **Independent and dependent variables are meaningfully related:**
   i. The experience of the respondents will be described in a way that will show relevance, consistency, persistence, and progression of the independent variable towards an increasing value of the dependent value.

2. **Variation in the independent variable is contemporaneous with, or precedes, variation in the dependent variable:**
   i. The temporal dimension will be present to demonstrate meaningful education, work assignments, and training towards a state defined by the dependent variable. Progressive phases should clearly be illustrated.

3. **There is a reasonable causal explanation for the observed relationship and there are no plausible alternative explanations for it:**
   i. It should be reasonable to conclude that the learning of the respondents is enhanced by experience.

Conceptual validity is present if there is a high correspondence between the mental construct (X’ and Y’) and the operational construct (X and Y). b1 and b2 represent conceptual validity for the constructs X’ and Y’ respectively. There is high validity if there is a strong association between the scores obtained by measurement and the intellectual definition of the constructs they are designed to represent. For the careers of the respondents, this seems to be likely.

In this research, evaluation of the outcomes should be done by looking at performance, consistency, and achievements of the persons studied. For instance, an input variable could be “books authored,” the measure the number of books, and the outcome the learning from authoring the books. In lifelong learning the output (learning) should necessarily be seen in a time perspective over a career. Internal validity should be evaluated as described above and the reader through reading this research as the evaluation is explicitly described can follow the argumentation. The reader in the same way can evaluate construct validity by asking if the measures are chosen well to represent the construct ‘Experience leads to learning.’ The paradigm of this study is constructivism with a relativistic ontology, which means that what is real for the researcher is not necessarily real for others. The respondents have, however, been asked to deliver their curricula vitae, which for academic respondents normally are detailed and updated. Factual information from these CVs has been included in the evaluation of respondents.
together with results from more factual questions. The reader can, therefore, reach his own conclusion based on the research data described in the analytical part of this research.

The temporal dimension of experiential learning is important not only for the length of the experience, but also in relation to the mix of academic learning and experience and the learning cases themselves. The constant interaction between theory and practice stimulates learning and makes it possible to progress to still higher orders of learning outcomes. When studying experiential learning throughout life, it is necessary to distinguish between experience and learning. Experience can be looked at as input in an experiential learning model and learning as the output. Input variables will be presented as the different professions or work tasks of the respondents (measures) and the scores from the measures as output variables. Output variables are difficult to put on a common denominator as they have many shapes and you very easily get into an “apple and pear” comparison. The scores from measurement will, therefore, be expressed as different achievements by the respondents throughout their careers.

The first part of the empirical study consists of an autobiographical platform case study. The epistemology of this study must necessarily be constructivist, presenting one case such as the professional life of the author. The empirical research components for this case are shown in the licentiate dissertation (Graff, 2007) and will not be repeated here. This second study is based on interviews with professionals from the academic and business fields. There are several methods to research whether learning has taken place. The difficulty is to separate which learning took place from practice (experiential) and which from theoretical (didactic, school) learning. As experiential learning by definition is something very personal, it is found natural to use interview methods and the narrative approach. Stories are collected from the field by interviewing respondents.

The research method is exploratory, trying to find factors that enhance learning and factors that hamper learning. By looking at these factors, it might be possible to assess individuals for specific positions in society and possibly set up a model for assessing their learning. “Exploratory research is usually conducted when the researcher does not know much about the problem and needs additional information or desires new or more recent information.” (Burns & Bush, 2008, p. 105.) In this study an interesting research questions has been how experience can influence learning. Is experiential learning as good as academic learning? Is academic learning needed at all? Indigenous people learn
without any formal, academic learning and they might be better adapted to their environment than any “academic” newcomer from the developed world might ever be.

The cases are autobiographical cases and told by the respondents in an interview setting. “At its root is the problem of moving from telling a story to living one, and that leap is at the heart of all entrepreneurship, be it in business or academia, or in this case, both” (Katz, 2004). This quote of Katz is for his appraisal of a new journal publishing narrative-based research and theory series to be born, but it fits in very well for these personal cases. They are living stories told and experienced by the respondents. “An autobiography is a self-narrative of identity” (Czarniawska, 1997.) The respondents try to identify central elements in their life as important for their experiential learning and present them for the researcher in a natural temporal order.

“We have to pay the closest attention to what we say. What patients say tells us what to think about what hurts them; and what we say tells us what is happening to us – what we are thinking, and what may be wrong with us.... Their story, yours, mine – it's what we all carry with us on this trip we take, and we owe it to each other to respect our stories and learn from them.” (Observation by doctor and poet William Carlos Williams. Here cited from Gartner, 2004).

It is common in narrative research for researchers to interview people and then transcribe the interviews. Nygren and Blom (2001) have used a method of asking respondents to reflect and then write down their narratives instead of telling them orally to an interviewer. They call this method a complementary method for constructing meaning. They think that a narrative written down by the storyteller is a more reflected expression compared to a transcribed interview. They refer to Ricoeur (1976) and his weight on the dialectics between explanation and understanding. The respondents will focus on turning points and critical events in their stories to explain and understand. The author has used a method of interviewing, audiotaping, and making résumés within 1-2 days after the interviews. The résumés were sent to respondents for approval and any corrections made. In this way respondents had options of further reflections and deepening which for some of the respondents resulted in further detailing by email.

Nygren and Blom (2001) in their analysis of social workers collected 14 narratives. They used a method of first reading the narratives “naïvely,” resulting in identification of categories of knowledge content in the descriptions. They refer to Ricoeur (1976) for the purpose of the naïve reading to “get a sense of the text as a whole.” In the licentiate
dissertation a “naïve reading” of the narratives resulted in categories that were labeled by function, for instance “education,” “lecturing,” and “books,” and later put in a temporal order under the labeling of “eras.” This was an effort to “get a sense of the text as a whole.” This procedure functioned for the platform case and gave meaning for evaluating the research questions. The categories are used for the sample cases as well to give meaning to the respondents’ life stories. The platform case is presented in full in Graff (2007) and a résumé presented in Appendix 1 to which the reader is kindly referred.

6.2 Sampling of the respondents and interview procedure

As we could see earlier, experiential learning suggests a holistic integrative perspective on learning that combines experience, perception, cognition, and behavior (Kolb, 1984 p. 21). The use of interviews as a method will provide a possibility of gaining knowledge of the respondents’ ideas about their experiences, perceptions, and behavior in relation to career change. The universe of the study is defined as people who have been entrepreneurial by shifting career. They should be in the late phase of their professional career and have made a career shift from academia to business or the opposite. In principle there are such individuals all over the world. The sampling method in this study is expert sampling – also termed judgment sampling. It is appropriate, if it is important that the respondents selected comply with the criteria set up for selection. Judgment samples are chosen based on thorough knowledge of individuals in the world. “Judgment samples rely on someone specifying what individuals are typical or judged to be representative of the population in some way” (Burns & Bush, 2008, p. 310). In this case it is the author’s selection of people he knows and has followed over years. They have had careers in academia and in business and have made a switch at some point in their careers. They are outstanding personalities in their own ways.

Twenty potential participants were identified, and from this population 12 people were finally selected and contacted to give their story of how their learning took place and how experience contributed to their learning. This short list was made for purposes of convenience. Reasons included the ease of approaching the respondents, traveling costs, and logistics in relation to interviewing. Four respondents were interviewed by telephone (Czech Republic, Singapore, Thailand, and Canada). All approached people agreed to being interviewed, but busy business traveling by two respondents prevented them from participating, which resulted in a final group of 10 participants. The list of respondents is shown as Table 6.1.
This list demonstrates that the sample was drawn from all over the world. It has respondents from USA, Canada, Czech Republic, England, Singapore, Thailand, Sweden, and Denmark. The list is sorted by date. Interviews were performed based on the respondents’ availability during January-March 2008 at times which were convenient for the author. This principle kept the pace of interviewing, shortened interview periods, and reduced travelling costs.

As the interview guide was for the convenience of the author, telephone interviews could be used instead of personal interviews for four respondents. These interviews were performed through IP-telephoning (Skype) where the additional advantage of a web camera facility was used. Although a questionnaire guide was at hand, the interviews were much guided by the respondents’ own story telling. The guide helped in getting the themes covered – sometimes by asking supplemental questions to cover these themes.

<table>
<thead>
<tr>
<th>Cases (C) (Respondents)</th>
<th>Comments</th>
<th>Interview date</th>
<th>Sample relevance</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Indiana, Pennsylvania, USA Adjunct Professor at USBE, Umeå, Sweden</td>
<td>22.01.08</td>
<td>From business to academia.</td>
</tr>
<tr>
<td>C2</td>
<td>CEO, global management company, Wisconsin, USA</td>
<td>27.01.08</td>
<td>From business to academia. A long expatriate career.</td>
</tr>
<tr>
<td>C3</td>
<td>Prof. at Jönköping International Business School, Jönköping, Sweden</td>
<td>15.02.08</td>
<td>From academia to management to academia.</td>
</tr>
<tr>
<td>C4</td>
<td>Author, consultant, PhD in psychology, England and Denmark</td>
<td>06.03.08</td>
<td>Leading executive search firm. Extraordinary career shift.</td>
</tr>
<tr>
<td>C5</td>
<td>Prof. at Aalborg University, Aalborg, Denmark</td>
<td>12.03.08</td>
<td>From apprentice to Professor.</td>
</tr>
<tr>
<td>C6</td>
<td>Business Consultant, Thailand, CEO Emeritus at Copenhagen Business College, Copenhagen, Denmark</td>
<td>20.03.08</td>
<td>From business to academia. A long career at Copenhagen Business College.</td>
</tr>
<tr>
<td>C7</td>
<td>Author, Commentator, Singapore, Adjunct Prof. CBS, Denmark, Ambassador Emeritus for Singapore</td>
<td>21.03.08</td>
<td>From business to academia.</td>
</tr>
<tr>
<td>C8</td>
<td>Prof. at Frazer University, Vancouver, Canada</td>
<td>26.03.08</td>
<td>From business to academia. Renowned lecturer at courses in several countries.</td>
</tr>
<tr>
<td>C9</td>
<td>Prof. at Luleå University, Sweden</td>
<td>28.03.08</td>
<td>From business to academia.</td>
</tr>
<tr>
<td>C10</td>
<td>Executive Consultant, PhD, Prague, Czech Republic</td>
<td>31.03.08</td>
<td>PhD with mix of academic and business positions during a transitory period in Czech Republic.</td>
</tr>
</tbody>
</table>

The research approach as a whole is both inductive and deductive. From the pilot study (licentiate dissertation) where an autobiographical case was used, a conceptual model
emerged as the result of the description in the case. It is inductive research. Now this model is used for several cases to test the conceptual model’s validity, and this is a deductive approach.

The research may be explained as (1) descriptive, as the respondents answers are taped and résumé-transcribed, (2) explanatory, as arguments for views and comments are explained by the respondents, (3) explorative in the sense that the conceptual model is exposed to corrections and extension, (4) normative because assessment models are constructed, and (5) predictive, as with certain profiles of experienced people it can give predictions of future career opportunities.

The study is based on qualitative research with case studies, and one can never generalize from this (statistical generalization) regardless of the number of cases. They can, however, provide construct validity and internal reliability (analytical generalization) (Yin, 1997). Future studies will show whether external validity and reliability can be claimed.

Instead of using a closed interview form, an interview guide was prepared which contained questions to be discussed. It is presented in Appendix 4. It helped the author to remember and address the questions. The advantages of an interview guide are that the interviews keep a narrative character and the respondents can tell about their ideas and experiences in an undirected way. Each interview typically took two hours and all interviews were taped. The tape recordings are stored at USBE. After each interview, a summary was made on the same day or the day after and then sent by email to the respondent for approval. The author analyzed the interviews by repeatedly listening to the tape recordings and making notes while going through the questions.

6.3 Ethical considerations

In relation to the interview study, questions of ethics are involved. Even though several of these ideas may appear self-evident, it will be necessary to reflect on them. These questions have to do with confidentiality, but also with the fact that the researcher knew several of the respondents prior to the interviews. Although, or maybe because, the respondents in this study are well known in the field, the researcher considered it appropriate not to publish their names. For close insiders there will always be a possibility of recognizing who the participating respondents are, as several personal characteristics are known in the field.
Knowing the respondents could be disadvantageous as well as advantageous. The neutral research position is lost when knowing the respondents which may affect the interview. On the other hand, knowing these people also created a convenient atmosphere for the interview which possibly made it easier for the respondents to tell their stories. Another advantage is that the respondents know the academic field and not all the details have to be explained, which also made the discussion during the interview more fluent.

6.4 Summary

This chapter has shown how one can work from a platform case and use variables found there as input for a larger study with more respondents. The argument for using interviews as a method was partly based on the nature of the research problem – a study of individuals with lifelong careers and how they describe the issues of their experiences. The study describes learning as an emergent process whose outcomes often represent historical records – the historical records are what I am interested in. The respondents reflect mainly on their previous experiences, but ultimately a recruiter is interested in performances in future appointments. By looking over whole careers, the researcher will often have a holistic view of the respondents’ past experiences that will give him a rich validation background for the respondents’ future performances.

Experiential learning suggests a holistic integrative perspective of learning that combines experience, perception, cognition, and behavior (Kolb, 1984). The interviews attempt to discover more knowledge and insight into these elements of experiential learning. The narrative approach enables the respondents to tell their stories and express their experiences and perception of their own learning. Moreover, the methodology should provide information about the arguments for career shifts and the problematics concerning competence development.

The construction of the cases in the next chapter will follow the procedure outlined in this chapter. Through an interview process, each respondent will tell the story of his or her career up until the date of the interview. The interviewer (this author) covers his research interests guided by his interviewer guide, but lets the respondent talk as freely as possible. The interview guide ensures that important theories and concepts from the study are addressed and data for the conceptual model obtained.

The theoretical findings of Chapter 4 are used as a guideline for questions in the Question Framework (please see appendix 4) and will also be of help for analysis.
CHAPTER 7

CASES

This chapter contains the ten cases researched. The data are obtained from interviewing the respondents and the reporting throughout the chapter is done within the framework of the conceptual models that were created in Chapter 5. The models are filled out with research data and a further detailing is done by reporting the interviews in a résumé form.
Ten cases will be presented and analyzed below. The tables used for presentation and analysis are explained in Chapter 5. The cases will follow a common presentation style to make it easier to grasp the content. The cases are analyzed and reported with the conceptual model in mind, with its three learning dimensions (content, incentive, and interaction) and a timeline of eras. The questionnaire framework reflects the conceptual model together with probing for theoretical experiential learning concepts.

The conceptual model (Table 5.5) is filled out with respondents’ data for all cases, along with levels of the three learning dimensions, their importance over time, the importance of environmental factors, and the “footprint.” All respondents were asked to distribute 100 points into the three learning dimensions, and 100 points into academic learning and experiential learning. These percentage distributions are included in the text.

In analyzing the interviews, two concepts were used. The first is labeled “USP for Case X,” where the “Unique Selling Proposition” for the case person is highlighted. This expression is borrowed from marketing, where it means what makes a company’s offering unique compared to its competitors. Here it is used as an analytical tool for finding characteristics for the specific person. The other analytical tool is “comments of special interest,” containing interesting comments made by the respondents.

Four of the cases are commented on in more detail (C1, C2, C8, C9) – partly because additional information made it possible, for instance with comprehensive CVs, and partly to test whether detailing would increase the value of the presentations. For these cases, an additional assessment has been done in the framework of “Gibbons and Hopkins scale of experientiality,” and they are reported more thoroughly through an era-analysis focus on the three experiential learning dimensions: content, incentive, and interaction. The headings in era-analysis are set in a bold font. Information was primarily collected by personal or telephone interviews, and the interviews are transcribed in a résumé form by the author. What is transcribed reflects the respondent’s voice.

As described, the reporting follows a common style. However, the nature of qualitative interviewing with a questionnaire framework is also inspired by the person being interviewed, to some extent following the route of the respondent through the narrative. Therefore, the reporting will not always be identical from case to case.
7.1 Case 1 (C1): Interview with Adjunct Professor, Umeå School of Business in Umeå on 22 January 2008

C1 was born in 1938 and is 69 years old. He lives in Pennsylvania, USA.

Pre-career:
1956-60: University studies, ending with a degree in engineering.
1965: PhD in engineering.
1960-1965 were influenced by the Vietnam War, which caused students to study hard. Qualified students were not eligible to be soldiers in the war.

Career:
C1 has had two careers, one in engineering/management and one in business. He holds two PhDs, one in engineering and one in business administration.

His career started in 1965 at Republic Steel Research Center dealing with high strength steel. He functioned as a project engineer and subsequently Group Supervisor in fundamental research.

1969-80: C1 was hired by Gould Inc., Cleveland. Focus was on market applications. It was a rough period economically. C1 had a high degree of freedom in choosing projects as long as they had market applications. C1 had a career in research management and became Associate Director of Research, where he was responsible for 60 people working on the development and commercialization of material related products. He did strategic planning, forecasting and business development for the corporate laboratory. Funding for projects was not a problem for him and his group.

1980: C1 set up his own business supplying technical and marketing information to companies. He still has this consultancy business.

1980-87: C1 started his teaching career as an associate professor of marketing at Indiana University of Pennsylvania. The subjects he taught were primarily within the marketing and planning field, and primarily for undergraduate and MBA students. He later held positions as Professor at Lynchburg College and Williamson School of Business in Youngstown.

1987: C1 was hired as Professor at Clarion University, a position he held for 13 years until 2000. He taught most courses in marketing, but specialized in industrial marketing and services marketing. He worked closely with the local Small Business Development Center in consulting with local firms and the Bureau of Industrial Development, Michigan Technology University, on applying university research projects to market-oriented problems and regional economic development. In this period C1 had
two sabbatical (unpaid (from Clarion)) leaves. These were used to support work in Visiting Professor positions at Michigan Technological University, Houghton; Umeå School of Business, Sweden; University of Malta; The Czech Management Center, Prague; the International Christian University in Vienna, Austria; and the Technical University of Civil Engineering, Bucharest, Romania. During his time at Clarion, C1 held many consultancy jobs, mostly in the small business area.

2001 – present: C1 has held a position as Adjunct Professor at Umeå School of Business teaching courses and advising PhD students.

**Question 1. Eras:**
C1 would divide his business life into the following eras:
1956-64: Formal education
1965-80: Industrial career
   1965-69: Republic Steel (fundamental research, research management)
   1969-71: Gould Labs (fairly fundamental work in battery development)
   1971-72: National Labs (visiting position to work on high temperature batteries)
   1972-80: Gould Labs, Cleveland (started as engineer, then engineering management, then staff planner)
1980-00: Academic career
2000- : Early retirement career – continuing academic career

C1’s teaching career began in fact from the very beginning in 1965 parallel with his industrial career, teaching courses in different industrial settings, colleges, and universities. Consultancy was similarly an ongoing activity for C1. C1 is used to work 55 hours a week. C1 even took some basic courses in electronics during his industrial career.

**Question 2. Environmental factors:**
C1 was influenced by the time he lived in. He was born in 1938, when USA was still in the Great Depression, and in 1941 USA participated in World War II. The area he lived in was a mill area. It was clear to kids and youngsters that they had to do well in school and educate themselves to get on the sunny side of society. There were many ethnic groups. 50% of the population was second generation immigrants from Italy and 25% were from Eastern Europe, but there was a small Northern European community too. C1 himself is a second generation immigrant from Scotland/Ireland. C1’s mother raised him early on as his father was enrolled in the war. She attended the workforce too. His father was liberal democrat and a union steward, and his grandfather was highly union oriented. They were pro-labor. In general the biggest influences for C1 have been family, technological development, and the long waves in industry. Technology led to flexible manufacturing and communication. C1 was able to adapt because of his interests and his education. When C1 started in industry, it was not an especially good time for engineers, but he did very well.
Key dates:
1965: Vietnam War
1973: Oil embargo
1980: Reagan. Lower taxes
1990: Clinton. Good years for teachers
2000: Good times

There have always been job opportunities for C1 through his career.

Question 3. Incentives:
A man has his profession. C1 thinks he has been working in the same way all the time. He doesn’t need special motivation to work. He thinks that education is fun. He has always been a bright student who learns quickly. From his youngest years he has been influenced by the carry-over from the depression in USA.

C1 has a long career in research, managing, teaching, and consulting. There is a fine line between research and consulting. He finds that every consultancy job is a case study. He has written research papers about his cases.

Question 4. Content:
d) The content dimension is covered by the career description. Looking at the “scale of experientiality,” C1 saw himself experiencing the first four of the five modes, or nine of the ten steps. He sees learning as a curved thing, sometimes uphill and sometimes facing setbacks. Some people settle on the lower levels and are comfortable there. In particular, C1 believes that any person can reach the highest levels.

e) Henrik Holt Larsen model: In USA, young business professionals change job every 18 months. Taking risk is not anything special for C1. As a research manager he was used to thinking in chances for success. Engineers take risks all the time. Entrepreneurs don’t think so much of risk. They are sure they will succeed.

f) Lewin’s B= f(P,E) C1 would change to Performance = f(Motivation, Capability) or Performance = f(Experience, Learning). Learning for C1 is how to take the next step.

h) C1 would evaluate that 60% of his learning is from practice and 40% from academic learning. “What you learn in an area you learn within two months. The rest is for becoming proficient or remembering what you have forgotten.”

i) Talking about learning by doing, C1 has been used to implementing things since his laboratory days when he was an experimenter. For time management he favors effectiveness (doing the right things) before efficiency (doing things still better).
**Question 5. Two Boxes:**
C1 thinks there are three boxes because most things are learned in interaction between theory and practice. You learn a great deal in laboratories. Some of the work was fundamental research such as studying metal structure. They used super thin foils. This is an example of using a practical thing to learn from. As a PhD you learn concepts (academic things). To do advanced things definitely demands theory. With practice you might be a blacksmith but not an engineer. One thing that is difficult to learn by doing is teaching. It is easier to teach when you have been in industry.

<table>
<thead>
<tr>
<th>Table 7.1: The conceptual model for C1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dimension</strong></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td><strong>Prior education</strong></td>
</tr>
<tr>
<td><strong>Lecturing</strong></td>
</tr>
<tr>
<td><strong>Consulting/Executive positions</strong></td>
</tr>
<tr>
<td><strong>Training/counseling</strong></td>
</tr>
<tr>
<td><strong>Authoring</strong></td>
</tr>
<tr>
<td><strong>Research</strong></td>
</tr>
<tr>
<td><strong>Interaction</strong></td>
</tr>
<tr>
<td><strong>Time</strong></td>
</tr>
</tbody>
</table>
Allocation of 100 points on:
- Content: 25
- Incentive: 40
- Interaction: 35

Allocation of 100 points on:
- Academic learning: 25
- Experiential learning: 75

USP for C1:
- Two PhDs – one in engineering and one in business administration
- Likes a stable life
- Bright person who learns quickly

Comments of special interest:
- Performance = f(Motivation, Capability)
- Performance = f(Experience, Learning)
- Learning is how to take the next step
- What you learn in an area you learn within two months. The rest is for becoming proficient or remembering what you have forgotten
- Effectiveness (doing the right things) before efficiency (doing things still better)
- One thing that is difficult to learn by doing is teaching

As C1 went from era to era, he remained interested and active in the same types of things – it was primarily the mix that changed. The split between teaching, scholarship (research, writing, presentation, discussion), and consulting remains over time, but is performed in another mix. In C1’s early retirement career it is scholarship that fills most of his time.

C1’s has published 220 articles in his career and his writing represents an impressive experience curve:

25 years for 50
32 years for 100
37 years for 150
41 years for 200

which makes the following experience parameters:

25 years for the first 50 articles
7 years for the next 50 articles
5 years for the next 50 articles
4 years for the next 50 articles
Table 7.2:  Level of three learning dimensions and their importance over time plus the importance of environmental factors for C1

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance over time</td>
<td>Increasing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C1 was influenced from the environment he lived in during his childhood and youth with Second World War and the Great Depression period still in force, so everybody studied hard to do well (environment high). With two PhDs and his academic career, the content level is high. The incentive came partly from the environment as described, but also through an inner drive for more knowledge. C1 has interacted in many environments in industry and academia and has always worked more than 55 hours a week, which is why the learning dimensions over time is evaluated as stable. Table 7.2 illustrates.

Figure 7.1: Lifelong and lifewide learning for C1

After his academic schooling for his PhD, C1 started in business as a research engineer and head of his department. After 15 years in engineering and engineering management, he started his academic career. C1 has lectured and done research, and has produced an impressive amount of journal articles. The experience curve is clear for C1’s development in academic writing, and he calls it experience work. During his academic career he has had a continuous workload from his own consultancy business. His main career has been
in academia in those years why the box is shaded full black in Figure 7.1 while his consultancy in business life is striped.

**Era analysis – C1**

1. **The taking-off era**

C1 was born in 1938 and lives in Pennsylvania, USA. He had his formal education 1956-60. He got his first PhD in engineering in 1965. The attitude at the time was that you should study hard to be successful. Parents were still affected by memories of the Great Depression. It was in the blood of parents, and qualified students knew they wouldn’t be drafted to fight in the Vietnam War.

2. **Business career era**

**Environment**

The environment of the time was characterized by the Vietnam War, the Nixon and Carter presidencies, stagflation, and the oil embargo in 1973.

**Content**

C1 started his career in 1965 as an engineer at Republic Steel Research Center dealing with high strength steel. He was project engineer and later group supervisor in fundamental research. His PhD in engineering proved useful. Five years later C1 came to Gould Inc. in Cleveland where he focused on market applications. Here C1 had 60 employees under him and he gained management. He learned to live with risks because he was responsible for selecting projects for development and market testing. In 1980 he started his own consultancy company, which he still has. The primary service is technical and marketing information for companies. After 1980 C1 went into a career in academia, but he has continued his consultancy work until today. While he was still working in engineering, C1 took an MBA in marketing and started his PhD in marketing, which he completed in 1982.

**Incentive**

C1 thinks he has been working the same way all the time. He doesn’t need special motivation to work. He has always worked at least 55 hours a week. A man has his profession. C1 is a bright person and this in combination with his childhood, where he
was raised by his mother alone while his father fought in World War II, and the influence of the Great Depression in the 1930s, have given him the mindset of working hard. Besides, it is a part of his personality to prefer things being the same all the time. He doesn’t like change, but he likes deadlines.

**Interaction**
As a manager for project groups, you interact with colleagues all the time in a very intense manner. If you are capable of making hot teams, you learn a lot from each other. During his business career, C1 also taught courses in different industrial settings, colleges, and universities.

**3. Academic career era**

**Environment**
In 1980 President Reagan was sworn into office. He lowered taxes. The Clinton era, from 1990-98, were good times for teachers. The times were still good for teachers when C1 retired in 2001.

**Content**
In 1980, C1 started his teaching career as associate professor of marketing at Indiana University of Pennsylvania. In 1987 he was hired as full professor at Clarion University – a position he held for 13 years until 2000, when he entered his early retirement period. In 1982 C1 earned his second PhD – this time in marketing. During two sabbaticals, C1 was Visiting Professor in Umeå, Malta, Czech Republic, Austria, and Romania. In 2001 he became adjunct professor at USBE, Umeå University, teaching courses and advising PhD students. C1’s teaching career began in fact from the very beginning in 1965, parallel with his industrial career. He taught courses in different industrial settings, colleges, and universities. C1 has an impressive academic writing career, with more than 220 journal articles. His production over the years shows a learning curve in which he wrote 50 journal articles in only 25 years, 7 years, 5 years, and 4 years respectively.

**Incentive**
What you learn in an area, you learn within two months. The rest is for becoming proficient or remembering what you have forgotten. This attitude might be behind C1’s continuous appetite for developing himself within the academic area. He still writes journal articles 55 hours a week. C1 is first and foremost inner driven. He likes to go to
conferences and participates in 2-3 a year, and this is an external motivator. C1 sets up this function: Performance = f(Motivation, Capability).

**Interaction**

In his academic career, C1 interacts with colleagues in the academic environment. At conferences he interacts with the international academic community. Through his consultancy company he interact with the business community. Performance = f(Experience, Learning).

**Conclusion**

C1 believes that a person basically does the same things throughout life, but that the split between the assignments change. His own profession of teaching, scholarship, and consulting has today a weight on scholarship (research, writing, presentation, discussion). C1’s experiential learning as an engineer has given him a work method and a mindset he wouldn’t have had without this position. Looking at his “footprint” in Figure 7.1, there is a good split between academic learning and practical learning which continues even today in his consultancy company. C1 believes in academic learning, but also in experiential learning. He has learned a lot in laboratories. He expresses it this way: “With practice you might be a blacksmith but not an engineer.” Doing advanced things definitely demands theory. He puts a lot of importance on motivation for learning. “I learn a lot when I need to” – incentive.

Table 7.3: Gibbons and Hopkins’ scale of experientiality on C1

<table>
<thead>
<tr>
<th>Learning</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>• Prior education</td>
<td>x</td>
</tr>
<tr>
<td>• Lecturing</td>
<td></td>
</tr>
<tr>
<td>• Consulting/Executive</td>
<td>x</td>
</tr>
<tr>
<td>• Training/counseling</td>
<td>x</td>
</tr>
<tr>
<td>• Authoring</td>
<td>x</td>
</tr>
<tr>
<td>• Research</td>
<td>x</td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
</tr>
<tr>
<td>Personality (ABC)</td>
<td></td>
</tr>
</tbody>
</table>

Table 7.3 portrays C1 on the experientiality scale. It is seen that C1’s learning is strongly influenced by his prior education and his research. His personality makes his ABC learning high as he interacts in both the academic and business worlds and he has a very egalitarian personality. Especially his interaction in the academic world forms his
personality. C1 considers the activity he does for his paper writing including the necessary reading as experiential learning even though the results go into academic journals. He also considers his preparations for course and seminars as experience even though they occur in academic surroundings.

7.2 Case 2 (C2): Interview with CEO of global management company, Author, Consultant, Wisconsin, USA in Denmark on 27 January 2008

C2 was born in 1937 when the birth rate in USA was at its lowest. Therefore it was very easy for him to get a job. He has been engaged in international business since his early years of education.

Question 1. Eras (epochs):

1956-62: University period of bachelor’s and master’s studies with keen interests in languages (Latin, French), international relations, and international business.

1962-65: Pre-Sears period with engagement at Export Managing Company in Chicago. C2 was outposted in Germany as his first assignment abroad in 1963.

1965-93: Sears period
1965-70 Europe, Vienna, Austria
1970-72 India
1972-74 Chicago Sears headquarters
1974-76 India
1977-88 Europe with 8 years in Italy and 2 years in Germany. Also responsible for Central and Eastern Europe, Middle East and North Africa
1988-93 Asia, Singapore. Manager for regional office in Singapore for South East Asia. At this time C2 was approached by the Export Institute of Singapore to lecture a course in cross-cultural business behavior. He also continued to lecture here after he left

1993-present Second career. Consulting, training, and writing. After Sears in Singapore, C2 came to Copenhagen, Denmark, to run courses at Copenhagen Business College in cross-cultural
business behavior. Other business colleges and Copenhagen Business School heard about his teaching and invited him to lecture in their classes. He published his first book at CBS Press in 1995 and it is now in its 4th edition and the best selling title over years for CBS Press. He has authored/co-authored four books and is writing a book (with his wife) about doing business in India. His writing has led to many consultancy assignments as well.

Question 2. Environmental factors:
The biggest environmental difference between Americans and Austrians are hierarchical differences. He also learned patience from the Austrians: “You cannot pass a bridge before you come to it.” India was the biggest cultural shock for C2, because of the heat, the dust, and not at least the big social differences with beggars and poverty. C2 traveled in his second period in India to Pakistan, Bangladesh, and Ceylon. In his first period in India, the red tape was a big problem, but in the second period he had learned how to cope with it better. In Italy, he saw major cultural differences between North and South Italy. In Germany, C2 had the task of reducing his staff, which he did not like. The sourcing had shifted to South East Asia, so he had to hire people all the time. In Singapore, C2 later trained businesspeople to do business with China. Although 77% of Singapore’s population is Chinese and their family culture is Chinese, their business culture has developed in quite another way. The British who set up a trading post there invented Singapore. They also invented Hong Kong. The British culture and the culture of the Chinese who were brought in by the British grew up together. Singapore’s first president, Lee Kwang Yew, has greatly contributed to the impressive growth of Singapore. C2 thinks about Lee Kwang Yew as a successful city mayor.

Question 3. Incentives:
All these expat jobs (eight expat assignments over the years) have been great challenges for C2 and his wife. His interest from school time in international matters, languages, and culture has been a steady incentive for C2. Operating in so many different cultures has made C2 very observant of cultural differences, and he has tried to find a pattern to help him manage them. He searched through literature in the field but there was little to find. (For instance, Hofstedes’ (1997) theory was not present yet in the 1960s.) He found Edward T. Hall’s theory best suited for his practice. Hall’s work was published in the popular press and was therefore accessible. C2 had to make decisions through trial and
error. In his book, C2 later expanded this theory and created his own framework, which has had much appeal for businesspeople around the world. C2’s job at Sears was to develop suppliers around the world. In order to do this, he had to understand their cultures and how to manage them. C2 was often contacted by international development organizations to speak to them regarding cross-cultural business behavior matters. C2 opened regional source offices in several places, for instance in South East Asia (Jakarta, Manila, Kuala Lumpur, Bangkok, Chittagong). C2 saw this as filling a practical need, but viewed in retrospect it was rather innovative for the time. C2’s reading of Hall’s theory helped him to structure his training.

C2 has had a great support from his family – especially his wife, who has supported him in all outposts. His father motivated him to follow his interests and not give too much regard to careers that pay the most. The years were easier at that time than they are today. There were many opportunities and C2 could follow his great interest in challenging jobs abroad. The pay was good too.

Much of the learning for C2 has been the hard way, through trial and error, but he also learned much from reading cases and from other expats. Expats often form a community where they frequently interact a lot and, so to say, train each other. In his time in Austria, C2 learned a great deal from his boss – a form of informal mentoring. C2 learned in school of John Dewey. The quintessence of Dewey’s teaching, according to C2, is “what works is good, what doesn’t work is not good” which is typically American, whereas for instance the French learn more from literature. C2’s own learning has been a combination of literature studies and practice, and he finds that the best form of learning. Actually C2’s first plan was to earn a PhD and become a university professor, but challenging job opportunities constantly arose and distracted him from that career.

Early on C2 developed a framework of cultural business differences. This was a practical thing for him when instructing visiting managers from Sears in C2’s regional offices. C2 could then inform them of cultural differences within an hour or so, which was often the limit of their attention spans. The framework had four divides: deal focused vs. relationship focused; direct vs. indirect language (low and high context cultures); egalitarian vs. hierarchical cultures; and expressive vs. reserved communication. C2 picked this up partly from literature and partly from practice and put them together.
Question 4. Content:
C2 has been used to training people from his early years. In his eight outposts he hired and trained locals on how to function in the Sears organization. In his second career C2 has done a lot of training for companies, especially in cross-cultural business matters, but this training has mostly been consulting, as it was company specific. In the first few years of his second career he ran an export managing company, in which he hired his son. Then in 1997 the financial crisis in Asia changed the business environment. In 1994/95 C2 got a contract with Copenhagen Business School Press to write his first book about Cross-cultural Business Behavior, which is now in its fourth edition and has been translated to several languages. The biggest market for the book at the moment is Norway.

Gibbons and Hopkins scale of experience: C2 thinks the model is applicable. The professors C2 respected the most also had practical experience. Much of what C2 has learned from academic learning he has constantly used, and he does so still in his second career.

Illeris model: The respondent agrees with Illeris’ model.

Kolb model: He considers this model to be okay. The best MBA schools require experience before starting school. Experience means a lot. The best students C2 has had are students that have been out in practice for some years. He thinks that this is valid for business studies, but maybe not for physics and other disciplines.

Question 5. Two boxes:
C2 allocated 60% for academic learning and 40% for experiential learning.
<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior education</td>
<td>C2 was born in 1937. Bachelor and masters studies in Intl Business.</td>
<td></td>
</tr>
<tr>
<td>Training/counseling</td>
<td>C2 makes many curricula for his courses at universities around the world.</td>
<td></td>
</tr>
<tr>
<td>Authoring</td>
<td>C2’s first book at CBS Press in 1995. It is still the best selling title at CBS Press. Now in its 4th ed. C2 is currently working on his 5th book. This is on doing business in India.</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>C2 has done extensive field research with many interviews in India for his new book on doing business in India.</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td>It was easy to get a job for C2. He has always been interested in Int’l Business and language. C2 has had eight expat assignments in his career. His family has supported him and joined him. Meeting so many cultures made him search for literature in the field. Hall’s theory suited him best. Hofstede’s theory did not yet exist.</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td>C2 learned much from trial and error, but also from academic reading. He had constantly challenging job opportunities. Working in so many different cultures sharpened C2’s cultural awareness and motivated him to learn about cultural differences and how to communicate in spite of them.</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td>Formal education 1956-62 Business career 1962-93 Early retirement/ Academic career 1993-</td>
<td></td>
</tr>
</tbody>
</table>

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Allocation of 100 points on:
- Content: 30
- Incentive: 30
- Interaction: 40

Allocation of 100 points on:
- Academic learning: 60
- Experiential learning: 40

C2’s USP:
- Long practice career
- Cultural diversity
- Very active early retirement period
- Family acceptance of expatriate periods
- Bright person
- High level of energy
- Quest for academic acceptance
- Practical approach to things: What works is good – what does not work is not good (learned of John Dewey in school)
- Searches academic literature to structure things and use as frames of reference for practice, such as when he formulated his own theory of cross-cultural business behavior

Comments of special interest:
- Early in life C2’s goals were a PhD and Professorship but challenging job opportunities constantly arose and distracted him from that career
- Opportunities were many when C2 went into business and his father motivated him to go for what interested him most
- Experience is very important in business studies, but maybe less important for studying physics and other disciplines

Table 7.5: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C2

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance over time</td>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
C2 has had high-level positions since his first years in practice. He has always been inner driven for mastering what he goes into. His eight different expat places around the world have brought him a high level of interaction. The job opportunities were many when he graduated from university, why the influence of the environment in Table 7.5 is set to middle, as he could have chosen many other job paths, including a PhD path for professorship. The learning dimension’s importance over time is stable as it started high and C2 has constantly found challenges in so many different cultures. The incentive is set at increasing as he has made a dramatic career change in his early retirement period into the academic profession with course developments, books, and speeches around the world. The interaction part is also increasing as he frequently interacts with several new contacts when working in his profession around the world. Environmental factors have always been a challenge for C2, so for him it appears more stable than for most people as he is able to make incremental adjustments all the time.

![Figure 7.2: Lifelong and lifewide learning for C2](image)

Figure 7.2 shows that he has had an extensive business career, but made a shift into a mixed academic and business career. He writes books and walks the talk by lecturing at business schools and company seminars, and is doing consulting in the field of his books.

**Era analysis – C2**
1. The taking-off era

C2 was formally educated in the period 1956-62 and took bachelor’s and master’s courses at university. He had keen interest in language (Latin, French), international relations, and international business.

2. Business career era

Environment

He was born in 1937 when the birth rate in USA was at its lowest, so it was easy for him to get a job. He was tempted to try international business and got a job at an export managing company in Chicago. The following year, the company sent him to Germany to take care of the company’s engagements there. Two years later, C2 started at Sears, the world’s biggest retailer of that time. He stayed at Sears 28 years and accepted early retirement.

Content

C2’s job at Sears was extraordinary, formed when Sears wanted to source from abroad to fill the increasing demand for consumer goods in USA. The economy in USA was booming and the industrialization process was at its peak. In Europe there were products you couldn’t get in USA, or Europe had a comparative advantage in producing them. C2 was sent to Austria to build up a European headquarters. C2 has trained people from the earliest years of his career, because he built up offices and needed people. C2 lived in India in two periods for a total of four years. In Europe he lived five years in Austria, eight years in Italy, and two years in Germany. He was responsible for Central and Eastern Europe, Middle East, and North Africa as well. For five years he was responsible for South East Asia with headquarters in Singapore.

As CEO of a sourcing office, you travel a lot. Sourcing means market research to find suppliers, contact them, build relationships with them, underwrite contracts, production control and quality control, and finally payment control. The constant exposure to foreign cultures when C2 was in office was a major challenge. Few people in the world have performed a job so complicated and demanding as C2’s.
Incentive
C2 describes himself as an active person. When he knows what to go for, he does it 100%. When executives from Sears’ Chicago office visited C2 at his regional offices, he felt the need to quickly inform them of cultural differences and peculiarities, so he tried to set up a model for this. He read literature about business culture, but not much existed at that time. Gert Hofstede’s (1997) famous research on cultural differences based on IBM regional representations around the world had not appeared yet. C2 found, however, good help in Edward T. Hall’s theory and found it could be used in practice. In his second career C2 refined and adapted Hall’s theory to his own experience and wrote his first book on Cross-cultural Business Behavior, which was published by Copenhagen Business School Press in 1995.

Interaction
C2 has had eight expat assignments during his business career. He has interacted with many more cultures as his expat offices were only hubs for travelling extensively and intensively in the whole region. As an example, C2 opened regional sourcing offices in several South East Asia locations: Jakarta, Manila, Kuala Lumpur, Bangkok, and Chittagong. In addition, he travelled to many more destinations in the region from his head office in Singapore.

3. Academic career era

Environment
C2 accepted an early retirement package from Sears. At this time he was 56 years old and he had still a large appetite for an active career. The business world in the 1990s was influenced by globalization and there was a big need for the expertise and competence of C2 in cross-cultural matters.

Content
He wrote the book “Cross-cultural Business Behavior,” now in its 4th edition and the best selling title of Copenhagen Business School Press for the 12th consecutive year. This is an impressive achievement. Based on his book and his long career at Sears, C2 lectures at business schools and business colleges around the world, and holds seminars for organizations, societies, and companies. The book has been translated into several languages, and Norway is its best selling market. C2 has written three more books and is currently working on a book about doing business with India. His wife is co-writing this
book, and they have made several recent research trips for this book. C2 is a busy lecturer at business schools, business colleges, and seminars around the world.

**Incentive**

From his take-off time, C2 had planned on a career with a PhD and a Professorship. At the same time, he remained interested in languages and international business. When C2 headed the office in Singapore, Export Institute of Singapore asked him to create a curriculum for the subject “cross-cultural business behavior” for use in its two-year further education program in International Marketing. This was a pilot program established as a turnkey program for Trade Development Board of Singapore by Copenhagen Business College. The course ran for a full semester and became a major success. C2 continued his lecturing and was invited to Copenhagen Business College to set up a similar curriculum. This was his introduction to his academic career and one of his incentives for accepting early retirement from Sears. The continuous lecturing at business schools, business colleges, and seminars around the world excites him and gives him new experiences and incentives for writing new books and setting up new curricula for lecturing. He studies markets in which he has no hands-on experience in order to give a more complete picture of cross-cultural business behavior.

**Interaction**

Company assignments are a vital part of his lecturing and they are most often mixed with consulting, as company executives are the seminar’s participants. Often such seminars last for several days so that he is always consulting during evening social activities. One consultancy job leads to the next by word of mouth. As it is always companies with international operations that consult with C2, he is still constantly in contact with the international business environment and constantly travels all over the world. He interacts constantly with people from all professions, from business college students to CEOs, and he loves his job. Long haul flights have, though, begun to be a nuisance for C2 – not least the changing flight conditions with security, delays, and crowded flights.

**Conclusion**

C2 thinks that all three learning dimensions are important, but gives the interaction dimension a little more weight. His long experience in interacting with many cultures has taught him a lot. Interestingly, C2 places 60% of his learning in the academic learning box. For him action is natural and he believes that “What works is good – what does not work is not good.” He thinks, however, that academic learning is the prerequisite for
behavioring at a high level. He has always searched through academic literature to structure phenomena he has seen in practice – for instance when he wrote his first book in Cross-Cultural Business Behavior in 1995. His experience as a manager setting up representative offices in many foreign cultures has given him hands on experience and much of his learning is by trial and error. In his academic career since early retirement, he has been able to use all his previous experience as a businessman and his habit of continuously reading academic literature. “Reading is easy,” he claims.

Table 7.6: Gibbons and Hopkins’ scale of experientiality for C2

<table>
<thead>
<tr>
<th>Learning</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>• Prior education</td>
<td>x x x x x x x x x x</td>
</tr>
<tr>
<td>• Lecturing</td>
<td></td>
</tr>
<tr>
<td>• Consulting/Executive</td>
<td></td>
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<tr>
<td>• Training/counseling</td>
<td></td>
</tr>
<tr>
<td>• Authoring</td>
<td>x x x x x x x x x x x x x x x x</td>
</tr>
<tr>
<td>• Research</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Personality (ABC)</td>
<td></td>
</tr>
</tbody>
</table>

C2’s incentive has been his desire since his youth to follow an academic career path and obtain a PhD and a Professorship. His curiosity and his high level of energy combined with his wife’s corresponding interests made them choose an adventure path into expatriate life for many years. His early retirement in his mid-50s challenged him to go into academic activities with book authoring, lecturing, and seminars. He has succeeded in this from the very beginning, urging him to continue this path. He has been very effective interacting with the whole “pyramid” from students to CEOs in his lecturing and training business. On the scale of experientiality, Table 7.6 shows that he reaches the highest levels as the result of his lifelong learning from practice and academia. This has developed his ABC status as well. What often is a weak point in individuals’ personal perception is cross-cultural awareness, because we all tend to use the self-reference criteria in our attitude to foreigners – we believe that how we do things in our culture is the best – but C2 has had all possibilities in the world so that he sees beyond the colored glasses of self-reference criteria which lead to ethnocentrism.
7.3 Case 3 (C3): Interview with Professor, Jönköping International Business School in Umeå on 15 February 2008 and 17 April 2008

Question 1. Eras (Epochs):
First Era: 1966: Graduated from Gothenburg School of Economics and Commercial Law. C3 wanted a career in academia and not in business. He thinks the reason was that he did rather well in school. The first era, he would say, was when he was asked by the full professor to join an ongoing project within the computer area. It was about making street traffic more efficient, in the early years of computerization. They created a computer simulation on the biggest computer at the time – an IBM 7090 with punch cards, located at The Technological University in Lyngby, Denmark. C3 finished his licentiate thesis in 1968 about how they constructed the experiment as a computer program. It dealt with flows of cars at street intersections and the number of stops at these. He made models concerning distance between cars. The learning was in a scholarly environment and was mostly scholarly, but the experiment’s content also made it practical. C3 has always been good in mathematics and physics. He learned the logic and power of computing. The expectations at that time were that computers would replace people.

Second Era: C3’s professor during PhD studies, Walter Goldberg, originally came from Czechoslovakia. He was probably the most intellectual person that C3 has ever met. He read a lot, he read fast, and he was extremely clever. He urged C3 to go to USA on a scholarship. In 1970, C3 received a scholarship from the Ford Foundation to study at University of Chicago. He finished his PhD there. Prof. Wagner influenced C3 in the area of optimizing production and inventory. His supervisor was Tom Morton. He pushed C3 hard but in a good way, presenting opportunities all the time. In 1973, C3 finished his PhD at University of Chicago and left for Sweden. In natural science you can either prove or disprove a research question. There is nothing in between, unlike social science in general. C3 was lucky to get outstanding results dealing with inventory control, and especially a model of the concave cost curve which continues to be referred to frequently. “Even though you have a concave cost curve, you don’t have to know much about the future to decide optimally today.”

Third Era: In August 1973, C3 returned to Sweden as “Forskar assistent” (research fellow). C3 had learned that in science, one had all the tools to be able to make good decisions. Surprisingly, nobody was interested in the area of C3’s learning. The excitement of quantitative models was no longer there. Walter Goldberg had left
Gothenburg for a position in Berlin. C3’s colleagues became quite depressed after that. The students were not motivated and many had left Gothenburg Business School. There was no research money and no enthusiasm. C3 decided to interview the staff. One of his questions was how many students had gone, and when he assembled the figures, he learned that the actual number of students had not declined, contradicting what was in the minds of his colleagues. This taught C3 the concept of Social Construction of Reality in a practical setting. People had been talking about problems, problems, problems, creating a meta picture that was wrong. C3 became interested in The Notion of Crises in Organizations. How could the organization get it so wrong that they saw the business school going down the drain when it actually was not? C3 realized his incentive was to be among people and find solutions to the problems of organizations. He had considered continuing with his very interesting research from Chicago, but this type of research was a very lonely thing, sitting in a room by himself. C3 now wanted a more outgoing position. C3 was asked to conduct similar studies at the municipality of Gothenburg. It was easy to get access to the people there, because they were predominantly graduates of the business school. The problem in Gothenburg municipality was that politicians had promised too much for the citizens. At the same time the economy of Sweden was in crisis, so there was no way the municipality could meet the expectations of its citizens. The tax level for the municipality was set at 15%, and the exercise became to decide what could be approved within this tax limit. C3 and Sten Jönsson wrote a paper called: “Myths and wishful thinking as management tools.” C3 made studies on local governments and civil servants together with Sten Jönsson. The studies were done in Västerås, Luleå, and Malmö. Incentives came from within in this period as from external environment. C3 remembers how exciting it was for him and Sten Jönsson to interview the people in the municipality of Gothenburg. He and Sten discussed them after the meetings and came up with exciting ideas during these walks. For C3 it was more interesting than sitting in a room by himself and researching mathematical issues as he had done in Chicago. Also the response from Gothenburg Municipality was motivating because they were highly interested in what C3 and Sten were doing.

Fourth Era: C3 divorced in 1976, an event that influenced him greatly. He started at the department of business administration in 1977 as head of the department (prefekt). He was hired as stand-in for the full professor as well. He applied for research money for studies in co-determination (Economic Democracy) which was popular at that time, so there was a lot of money to apply for. C3 was motivated to go into administrative jobs and stay busy with them to soften his negative feelings after his divorce. C3 remarried in 1977
but divorced in 1979. In the same year C3 found his third wife, and they are still married. In 1978, C3 was the only full professor at what was to become Umeå Business School. Actually, it was a department of the Department of Business Administration. The business school was not founded yet. C3 started the 1984 Scandinavian Journal of Management and was its editor for some years. Then the notion of a business school arose, “The Northern Sweden Business School.” Luleå wanted it to be located in Luleå, which was out of the question, so it was founded in Umeå, backed by Umeå University management and the Governor. The Governor supplied the project with SEK 10 million. In the end, the project group had collected nearly SEK 35 million. Nils Wåhlin from USBE was secretary for the project.

**Fifth Era:** 1992: After some time C3 received an inquiry from Stockholm to join in a research project. This moved C3 out of bureaucracy and into research again. He came into project management. The incentive, besides the offer from Stockholm, was a walk C3 had with his coming wife on the banks of Umeå River. He told her about his offer to join in the research and she replied that she as an architect worked with projects all the time, and this aroused his interest in project organizations. C3 formed a group at USBE to work on project organization with, among others, Anders Söderholm and Tomas Blomquist. They started a society called International Research Network on Organizing by Projects, IRNOP, which became successful – also in relation to the industry. The industry paid a lot of attention to this organization, which was a marked contrast to their interest in organizational theory in general. C3 felt strength from the interest people showed their work. Conferences every second year were arranged as well, starting in 1994.

**Sixth Era:** 2001: Dean in Jönköping. C3 was hired – at first against his will – to be a dean at Jönköping International Business School. He stayed as a dean until March 2007 after which he stayed as a full professor to do research. He does research within the MMTC, Media, Management and Transformation Center. They deal with managing media companies. C3 is now doing academic work again: evaluating people for professorships, writing research funding applications, writing papers, etc. One area is TV production companies, where he interviews people on how they manage projects.

**Question 2. Environmental factors:**

Environmental factors are covered by question 1, as they are intertwined with the era description and best represented there.
Question 3. Incentives:
When C3 came to Umeå, he was the only full professor, so it was expected of him to take the department head post. C3 stepped down some years later due to the necessity of making decisions that people didn’t like. He also missed his research work. C3 works best with people around him. C3 draws strength from the interest people show in his work. He works well against headwinds. C3 is a curious person with much inner drive and the need to achieve. “I need to create something.” Carin Holmquist once said to C3: “You are a true entrepreneur.” C3 doesn’t look at himself as an entrepreneur, but looking back he admits that he has done entrepreneurial things. The thing he is most proud of is his role in establishing the Scandinavian Journal of Management. Upon showing C3 a model of entrepreneurial learning to comment on, he said: “I was never very confident and never believed in myself. Unfortunately, it was one of my problems.” C3 also said: “I need other people around me. I need to feel it is useful in one sense.” “I don’t want to sit in an ivory tower reading things and learning new things if I don’t know or see the usefulness or there is a need for it – a sort of inner drive. Sometimes I start things I don’t finish. One thing I am not good at is painting pictures. My wife is an architect. She paints aquarelles. And there she is extremely good, and she has been working hard to talk me into it. A couple of years ago I bought all the materials I needed. You know the paper used for it is extremely expensive. I bought books on painting, brushes and everything I need, but I haven’t completed one picture. I didn’t feel the drive. Everything is there, and if I needed her help she would be happy to help me.” “I learn from other people when I discuss with them and trying things on them or when I am interviewing other people with different careers compared from my own.” “A lot of people observe others. Not necessarily scrutinizing them – just observing them. What is going on?”

Question 4. Content:
The content dimension of C3’s learning clearly emerges from the Era-résumé in Question 1 and shall not be repeated here.

Question 5. Two boxes:
C3 allocated 10% for academic learning and 90% for experiential learning.
Table 7.7: The conceptual model for C3

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training/counseling</td>
<td>As a professor, curricular work.</td>
<td>Prefekt Dean</td>
<td>Interacting with community, for instance when founding USBE.</td>
</tr>
<tr>
<td>Authoring</td>
<td>19 books or edited publications.</td>
<td>See “Authoring” above.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>48 articles, printed conference</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>contributions, chapters in books.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>86 working papers, conference</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>papers, research reports.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>11 Investigative reports.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td>Out of worker’s family. Born with</td>
<td>Did well in school. Good in math and physics. Good colleagues and mentors.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a feeling of inferiority.</td>
<td>Divorced.</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td>Problems in 1973 at University of</td>
<td>Interacting with community, for instance when founding USBE.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gothenburg were an eye-opener for</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>C3. Research for municipality.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td>Formal education 1959-73</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Academic career 1966-1978</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1992-2001 2007-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management career 1978-1992</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2001-2007</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Allocation of 100 points on:
- Content: 5
- Incentive: 40
- Interaction: 55

Allocation of 100 points on:
- Academic learning: 10
- Experiential learning: 90

USP:
- Good in school – especially in math and physics
- In and out of research and management
- Strong personal conflicts from childhood and divorce
- “I was never very confident and never believed in myself. Unfortunately, it was one of my problems”
- “I need people around me. I need to feel it is useful in some sense”
- Highly respected academic and management person
- Opportunities in the environment when new institutions were built up
- Founding editor of Scandinavian Journal of Management about 1980
- Founding dean of Umeå School of Business (USBE)
- Good mentors
- Interested in the notion of crises in organizations

Comments of special interest:
- There was plenty of research money in the system in 1978 when C3 became associate dean
- In natural science you can either prove or disprove a research question. There is nothing in between, unlike social science in general
- “A lot of people observe others. Not necessarily scrutinizing them – just observing them. What is going on?”

Table 7.8: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C3

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Importance over time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Increasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C3 has always been bright and good in school. Became PhD in Chicago and got scholarship in USA. He has had an inner drive for performance, and the environment produced many opportunities which C3 seized. Interaction with society was especially heavy in periods of founding the business school in Umeå and Scandinavian Journal of Management, but also his long dean periods were high in interaction. This characterizes C3’s life in general why the importance over time is set to stable in Table 7.8.
C3 has been in academia all his life, but for many years he held administrative positions there as program director, associate dean, or dean. In 2007, he stepped down from the deanship once more to focus on his professorship. C3 did research for the municipality of Gothenburg and later in Västerås, Luleå, and Malmö. Otherwise C3 has been in the forefront of development within the business school sector in Sweden. In top of this he has been very busy producing journal articles and other academic papers throughout his professional life. A very impressive workload has been overcome. The striped areas in Figure 7.3 are periods where C3 held managerial positions within academia.

**Conclusion:**
The case draws a picture of a highly intelligent man who has worked hard all his life. He is a sensible man who is very dependent on interaction with colleagues. He is entrepreneurial as well, with major achievements behind him such as the establishment of USBE and the Scandinavian Journal of Management. His allocation of points for experiential learning and interaction shows his own awareness of his way of learning. He needs people around him as a sounding board for his decisions. He also constantly needs positive input from colleagues.
How do we learn? This question opened the interview. The interview is summarized in the following: We learn all the time. 90% of our learning is subconscious. Learning can also be negative, for instance bad habits. Children learn by copying people close to them. Learning is also going from discomfort to comfort as when a baby needs a diaper changed. When older, learning depends on who teaches us. It is not so much the knowledge of others as their expectations of another person’s ability. If teachers’ expectations of students are low, the learning will also be low. Learning is acquiring knowledge or experiences you previously didn’t have. There are many forms of intelligence, but they are difficult to measure. Take a construct such as love. How do you measure it? Love is compromise. Those who compromise the best stay together. Love is the ability to satisfy the other person’s needs. Like in business. A company should satisfy its customer’s needs.

A person does not like free choices. He wants his choices predetermined. We were in a “me, me, me” period in the 1980s and 1990s. Thirty years ago we had fewer choices. The church, for instance, set boundaries. Today values and integrity are gone. If we go to junior school and grade integrity, character, and behavior the same way as we grade history, we would have quite a different school. For C4 it is all rather easy. It is all about ABC: Attitude, Behavior, and Character. But that has to be learned too. A good attitude leads to good behavior and this forms your good character. University students don’t know yet which attitude to take. (That’s cool, that’s boring, and this institution is a bastard.) They should wait until they work for their first boss. Then your attitude will be built around what you can do for him.

Most people don’t buy on the basis of what they can gain, but on what they can lose. “If I don’t buy now, it will be more expensive next year” – for instance in the real estate market. In academia we place too much emphasis on formal education. We should widen our perspective. We still only measure two intelligences: verbal and mathematical, but we should widen the concept. It is too narrow. But formal education is necessary. C4 loves it. Because otherwise we cannot build airplanes or bridges, become doctors, etc. But we should design it better. It should be inclusive not exclusive. What does it take to be successful in your job? The bottom line is skills, whether formally learned or not. If you
split competence into two halves, you get interpersonal skills and intrapersonal skills. Interpersonal skills are about getting along with people. Intrapersonal skills are about how well you know yourself. Children at age 14-21 are seeking their identities. Adults know theirs. You cannot force kids, but you can direct them a little bit and be their mentors.

Your formal skills you have from training, but your informal skills are ABC (Attitude, behavior, character). Research shows that most of us can do an adequate job by using 60% of our skills and talent. The other 40% is not mandatory – it’s voluntary. We will go the extra mile because we want it.

Regarding the Illeris model’s content, incentive, and interaction, C4 sees incentive as a two-way thing: first, what is in it for me, and second, what can I do for others. If you give something for nothing it has no value. It is good to help others, but you should help yourself first.

We are tribal, we are hierarchical, and we are biological. There’s nothing we can do about it. Biological means we are sexual animals and thereby competitive. We have our tribes, for instance two teams at a football game. We are hierarchical. “How am I doing compared to him?”

The biggest hands-on learning system was apprenticeship. C4 wouldn’t allow anyone into university unless they spend two years at a job first. Then an academic degree should be achieved in only two years. And he wants an assessment from the employers about the ABC of the students. They are just as important as scholastic qualifications. The ABC should be assessed by a formal assessment system. It is easy because employers have always assessed ABC: “How does this apprentice go along? Is he helpful? Can he communicate with people? Is he nice?” In a formal way you can check off these constructs by assessing five simple questions for each element ABC. The old values of trust, decency, keeping your word, duty, and honesty are coming back into fashion. In the last six years, the society has shifted to those values. The 1980s and 1990s were narcissistic (“me, me, me”). It is moving from me to we. Barack Obama is about “no more of the old thing.” We are hierarchical. We need guidance. In the past, the most senior person was the leader. We form tribes around values. Leaders’ job is to create more leaders – not more followers. To be good at a job you should be concerned about how to make life easier for someone else. Then you are good at your job.
Talking about experiential learning and looking back, C4 thinks he was a nuisance making people’s lives harder. He was ambitious and a “me, me, me” person. It didn’t work for him. We talked about his ten pieces of advice in one of his books. You should be yourself and cater for yourself, but also help others. Helping others gives C4 much more than the benefit of the receivers. A good ABC status is also important for learning because 90% of our learning is learned subconsciously. Subconsciousness does not have any humor. Our primary job is to keep our behavior consistent with yesterday’s – even if yesterday’s was wrong. If you internalize things they become you. You “walk the talk.” Body has memory. The body responds to the way we train it. We have seven intelligences at least (maybe several hundreds). From Gardner we have: mathematical, verbal, spatial, kinetic, rhythmic, interpersonal, and intrapersonal. We all have different combinations of those. We should train what we are best at and do it over and over again. It is called learning – experiential learning.

The expectation of the event is greater than the event itself. You get what you expect, not what you deserve. If you expect the worst you will get it. If you expect the best you very often get it. It is different from fearing the worst. Body and learning – if you look at the stock exchange guys, they are very animated. They talk very expressively. This gives you more energy. It gives your body learning. It is called “the mind-body continuum.” Both interact with each other. The biggest killer is worry. Financial insecurity. In some tribes simple rituals can get you killed. If you believe you can/cannot you are absolutely right.

Many people have these concerns: “I am not attractive enough,” “I am not beautiful enough,” “I am not academic enough,” etc. We tell ourselves about 1600 words a minute. The negative things become our reality. Our subconscious mind starts to believe it. Your subconscious mind has no humor – it works like a computer. If you tell it something negative it starts to believe it. But it also works the other way around with positive things. Write the negative things on a piece of paper; hold it in your hand for a minute; and then throw it away to let the negative things disappear. This exercise works, with a little practice. It is called deconditioning the fear. Each time you do it, it will be a little easier until one day it is now manageable. In learning, sometimes we have to unlearn before we can learn.

The eras of C4 life have been governed pretty much by the normal phases of life of a human being, which he describes like this:
C4 found out in his mid-30s that he had to find “me.” He was a successful musician with sales of 44 million records who had earned a lot of money. “Am I happy? No. Am I unfulfilled? Yes. Am I understimulated? Totally.” Then he started to study psychology. He found he had some intrinsic understanding of it. He found that 80% of it was academic nonsense – something that worked in laboratories but not in the real world. He decided to devote his life to the remaining 20%. He likes helping people, which might not be smart, but it is him. He feels that he can make people interested in learning. He wants to make a complex thing simple – many other professionals want to make simple things complex.

We have four psychological needs: results, status and recognition, security, proof and low risk. One of them is dominant. Find out which one it is. Satisfy it. That’s it. People are not Human Resources. Resources are something you can move around. People are resourceful humans! C4 does a lot of “talent management” search/evaluation. IQ tests measure a person’s capacity to learn – like measuring the size of a hard disk. But what matters is how you use it. MENSA’s qualifications are an IQ of 140. “But most of its members drive buses.” Most people have the capacity to learn. C4 has never met a bad person, but only a person who did bad things. The way C4 selects people for companies is an hour-long interview with the person where they do the ABC personality test. They look at their client and ask whether this person would fit into the team. Are they worth having for it? Then comes a chemistry test. Do you like him/her? (The foundation of all relationships.) It is possible to put figures on these. From one to ten. Instinctively tick it in. Don’t make it too complicated. We cannot use the old stereotypes any more. We don’t fit in and probably never have. C4 also ask applicants for their CVs, but they are only historical documents and not especially indicative for a future, specific job. To perform a job is a team concept. We are tribal animals. We are not meant to be alone. How can we get an
indicative feel for something? With a chemistry test. If a person can fulfill the psychological needs, most of the time he will do extremely well. When a person’s psychological needs are not fulfilled, he will leave the organization. He feels unmotivated, understimulated, a bit depressed, unhappy, and turns into a mob. Recognition needs: I want to make an impact; I want to make a difference; do you recognize me for this?

Dewey’s model is accommodative learning. Lewin’s is okay.

Kolb’s model is CE: unconscious competence, RO: conscious incompetence, AC: depends on left hand or right hand brain type. A right hand brain will form abstract concepts much earlier on the curve and more frequently. Abstract concepts are very important and control our lives much more than we think. Constructs such as beliefs, love, and fashion are abstract concepts – something that we cannot measure and put our hands on. Psychology is abstract concepts too. We really don’t know how our brains work. We only know a little bit. Metaphors are the language of the tribe. All learning is experiential. C4 loves academic learning, but stresses the social side of learning. He puts it on the same level as for instance mathematics. If we could design schools today we should do it completely differently. We should bring in people from different professions (business, industrialists, educators, psychologists, sociologists, etc.) and let them make a new model. Most people are unsatisfied with the school models of today. We need a new learning model. There is an old saying: “If it ain’t broken don’t fix it,” but there is also a saying: “If it ain’t broken, you haven’t looked hard enough.”

Learning is a lifetime journey. Young people should think of learning as cool. Let them practice sooner. They should leave school as responsible people with ABC (attitude, behavior, and character). Society should honor teachers better. They are overloaded with paperwork, administration, etc. Society should pay them more and make them prouder. Let’s try the test: remove all teachers, policemen, and nurses for one month and have a look! Then society will talk business! Society totally undervalues these people.

Academic learning box: Formal education plus. C4 has learned facts and knowledge. They are necessary. We need knowledge and facts. Practical learning box: Challenge the facts and apply the facts.
C4 believes in knowledge sharing. It is a non-question. You should share. You should compete with the external world – not the internal. It would be destructive. Envy is a known fact, but you should compare with yourself not with others.

Table 7.9.: The conceptual model for C4

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Consulting/Executive jobs</td>
<td>First period of his professional life he was musician, lyrics writer, and singer with 44 platinum, gold, and silver records. Established C4 International 15 years ago. Offers management education and fast-track courses at Master’s level. Offices in Denmark, Sweden and Norway. Executive recruitment and coaching.</td>
</tr>
<tr>
<td></td>
<td>Training/counseling</td>
<td>Runs his own pre-MBA courses and his Graduates for Cand. Success series.</td>
</tr>
<tr>
<td></td>
<td>Authoring</td>
<td>Authored more than 25 books. One on Dyslexia and 12 books for his Cand. Success series for Graduates plus several more.</td>
</tr>
<tr>
<td></td>
<td>Research</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
<td>Not happy, unfulfilled, understimulated as rock musician. Driven by making psychology more useful in practice. He has success with what he is doing.</td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
<td>Praised apprenticeship. Subconsciously is 90% of our learning. C4 frequently interacts with many groups of society.</td>
</tr>
<tr>
<td>Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td>Formal education</td>
<td>Business career</td>
</tr>
</tbody>
</table>
Allocation of 100 points on:
  Content: 33
  Incentive: 33
  Interaction: 33

Allocation of 100 points on:
  Academic learning: 30
  Experiential learning: 70

C4’s USP:
- Multi talented
- Intrinsic talented for psychology
- Radical career shifts
- Successful in whatever he does

Comments of special interest:
- Every child is a born genius (Einstein)
- God doesn’t expect us to be successful – but he expects us to try. (Mother Teresa).
- Educo: “to bring out what is in you” he takes seriously
- His first book in the UK, The Powerfax Inner Management System (1990), is used by 150,000 managers worldwide
- We should train what we are best at and doing it again and again. That’s experiential learning
- Believes in his ABC model (Attitude, Behavior, Character)

Table 7.10: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C4

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Middle</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
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<td></td>
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</tr>
<tr>
<td>Increasing</td>
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<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Table 7.10 shows high levels of all three learning dimensions and the environment. When C4 was 14 years old his family emigrated for Australia, and he later went to London to study psychology where he earned his PhD. The content dimension has been set to increasing because of his growing authoring in different fields (25 books thus far).
Because of the high level of factors, the importance over time for incentive, interaction, and environment have been set as stable.

Figure 7.4 illustrates C4’s career as rock musician after grammar school and his sudden shift away from music to earn a PhD in psychology. After this period he worked in the psychology profession as a management psychologist consultant. He continues to develop this side by establishing educations for graduates and an accompanying book series. He has written over 25 books.

Conclusion:
This respondent is a professional psychologist with all that means for his knowledge within his field. He pays much attention to experiential learning and the personality dimension of competence. He believes that learning is best facilitated by a balanced allocation of content, incentive, and interaction. Human beings are social animals and therefore psychological factors mean a lot, but it is the simple psychological factors that should be addressed – the ones we find in “good” attitude, behavior, and character. He is entrepreneurial, as he has made distinct career shifts during his life course.
Experiential learning and academic learning complement each other. Academic learning can take a person further. C5 comes from a grocer’s family and has been an apprentice in a grocery store himself. When C5 started at Copenhagen Business School, 60% of the students there had been in practice. Far fewer have been in practice today, instead going to business school directly from grammar school. C5 thinks of his apprentice education as a good education. It has formed the way he thinks. The apprentice period at that time was four years and could, in C5’s opinion, be reduced to only two.

C5 felt a need for more theory and started at Copenhagen Business School. C5 had a personal problem from birth to overcome and he sees his interest in further education also as a kind of protest – he wanted to show that he could do it. He was supported by his parents and the military where he was before CBS. C5 was very happy with his time at CBS. He was strongly motivated by Prof. Torben Agersnap, who was as a mentor for him and his study mates. TADPOLE was a study group of 5-6 students that invited guest lecturers from business life. At that time (1960-1963) there were only 60 students, of which 25 came from Norway annually.

After earning his master’s degree, C5 went into business life as business consultant for some years. At that time, he felt a need to go abroad and got a DANIDA Junior consultant job on Samoa Islands. Torben Agersnap urged him to “do some writing out there.” C5 had kept his connection with CBS as lecturer on an hourly basis. C5 became interested in two water projects being implemented on Samoa Islands. One of the projects succeeded and the other failed, and C5 wanted to research why. He sent his findings to CBS, beginning a communication that ended with CBS offering C5 a job as amanuensis. He finalized his study at Samoa Islands and published it as a licentiate dissertation, winning him the Tietgen Prize. Again C5 finds that the large amount of support he received from many sources, including CBS, had great importance.

C5 and his peers wondered “what is wrong in Denmark.” This was in Prime Minister Anker Jörgensen’s time, when the economy was in bad shape with a huge trade deficit. C5 wanted to find out what characterized the culture in the West, find out what problems there were, and devise solutions.
C5 was dean at Aalborg University for a time. He found that he had too little time for research. His wife and he decided to go together on a “seminar” – those two alone. They borrowed a cottage. They went into “groups” to define the problems they saw and met later in “plenum” to discuss their issues. One of the issues was that the dean’s job took all his time, but he couldn’t find a way out. His wife asked him if, when he reached pension age, he wanted to be remembered as dean at Aalborg University. This was an eye-opener for C5, and shortly after he quit his job as dean and went back to research again, a step he has never regretted.

Culture has major importance. He saw it at Samoa Islands and later on Greenland. People are tribal and many problems arise from this. He has seen a great development on Samoa Islands where young people today get a formal, academic education and some of them return to the islands and go into public administration or become Matay (chiefs of tribes). C5 cannot judge whether the modern system is better than the old one where you became a Matay through local rituals. Today development projects at Samoa Islands start by consulting the locals to see how they do things. Then the developers try to improve things from there.

If C5 should describe eras, he would mark his first period at his father’s grocery store where he helped as a child. Included in this is his apprenticeship at a grocery store. The second was his student times at CBS and the third one was engagement as amanuensis at CBS. Torben Agersnap, CBS, was again a big motivator for C5; he motivated C5 to apply for a professorship at the newly established (1974) Aalborg University.

C5 looked at the box “Aspects of employability” from Knight and Yorke (2003, p. 151) with its three groups of aspects: A) Personal Qualities, B) Core Skills, and C) Process skills. He immediately missed the cultural dimension in Personal Qualities and “to be humble” too. The list seemed a little self-centered.

C5 liked the Illeris (2007) learning model and discussed especially the Incentive dimension. He thinks that your focus is directed towards what interests you. He also thinks that in areas that interest you most you are always disappointed, because other people have different interests. You cannot change the other people and have to meet them “halfway.” C5 talked about a mundane experience in his time as apprentice when his boss passed him while he was sweeping the floor. His boss bent down and picked up a rubber band and put it in his pocket without saying a word. It could be used again. This silent experience was a learning experience for C5 that he thinks of even today.
C5 marked the three dimensions Content, Incentive, Interaction by distributing 100 points for their individual importance. He has Interaction 50%, Incentive 30%, and Content 20%. He also distributed points into the two boxes “academic learning” and “practical learning” by 50% in each. C5 thinks he has been lucky many times by external influences from society. Aalborg University was established and he has worked at a good place at CBS where Torben Agersnap supported him. He acknowledged the influence of “good” people on his own character. He also praised academic learning, because he couldn’t have the job he has without it.

Table 7.11: The conceptual model for C5

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Lecturing</td>
<td>Lecturing at CBS.</td>
<td>Lecturing at CBS.</td>
<td>Lecturing at AUC.</td>
</tr>
<tr>
<td></td>
<td>Consulting/Executive jobs</td>
<td>Consultant at leading Danish consultancy company.</td>
<td>Member of several committees – also humanitarian ones. Assignments in more than 20 countries. Guest lecturing at more than 20 universities around the world.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training/counseling</td>
<td>C5 was Dean for some years but missed research and left the dean job.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Authoring</td>
<td>Several chapters in other books and his own recent book in 2007.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Research</td>
<td>More than 30 research papers, mainly on cultural issues.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C5 felt a need to go abroad. Felt a need for more academic work.</td>
<td>Personal problem from birth to overcome. Academic achievements are compensating measures. Strong motivator in his “mentor,” Prof. Agersnap from CBS. Strong interest in multicultural issues. Your interests guide your activities. DANIDA-job at Samoa Island started C5’s academic career.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Apprenticeship period of big importance</td>
<td>C5 was part of a dynamic group at CBS. Mentor in Prof. Agersnap.</td>
<td>Denmark’s economy was in bad shape in the 1970s, which triggered C5 to look for cultural explanations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Eras</td>
<td>Pre-education period 1954-58</td>
<td>Formal education 1958-65</td>
<td>Business career 1963-68</td>
</tr>
</tbody>
</table>
Allocation of 100 points on:
  Content: 20
  Incentive: 30
  Interaction: 50

Allocation of 100 points on:
  Academic learning: 50
  Experiential learning: 50

USP for C5:
  - Apprentice in a grocery store
  - Personal problem from birth to overcome
  - Good mentors
  - Good external conditions – he feels lucky

Comments of special interest:
  - In areas that interest you most you are always disappointed
  - Influence of “good” people on his own character

Table 7.12: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C5

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Importance over time</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C5 has a long academic career and professorship which place him in the high content box in Table 7.12. He has been influenced and motivated by good mentors. He went abroad early and did studies at Samoa Islands and later Greenland (high interaction). He has always been motivated by mentors (high environment). C5 has kept the high level throughout life and the three learning dimensions are all set at stable.
C5 was apprentice in a grocery store (experiential learning) and then attended business school. After earning his master’s degree he went into consultancy business in two of Denmark’s largest consultancy firms and then into a doctoral program, after which he continued in academia as professor. Thus C5 obtained a practical foundation for his career early on. Figure 7.5 illustrates C5’s career.

Conclusion:
This respondent is a perfect example of the good influence of building practice periods into learning processes. He started as an apprentice, entered academic learning at university, then moved into practice working as a business adviser, where theory and practice met. After this he entered quite a different culture as a scientific expert giving advice to local government. There he was challenged by research opportunities, and wrote his university dissertation based on research in this foreign environment, after which he moved into a career in academia. Incentive factors were rich, and he believes interaction factors have also contributed much to his learning.
The question “How do we learn?” opened this interview.

Simply by using our senses. We accumulate knowledge all the time consciously and unconsciously. We try to make meaningful patterns and observations of what we sense. Learning is very individual. The same stimulus will influence different people differently, because they have different backgrounds, values, perceptions. It is individuals that learn, not groups. Humans learn – full stop! Then you can structure the process afterwards. Some decades ago people thought that people only could learn if a teacher stood in front of them in a classroom. Mark Twain once said: “Never let schooling interfere with your education.” The role of the teacher is to ease the learning process within certain areas which society/learner etc. thinks are important. The teacher shall facilitate the learning by using good textbooks and delivering good examples. The facilities should be such that everybody can see and hear. C6 talked about the Zygarnic effect: the best way to teach students is to leave them with an unanswered question.

C6 went to business school after high school. During his master’s studies he had a part-time job at a large international advertising company. This made him better able to address the examiners during his master’s exam. His advertising agency experience was also a stepping stone for his first job after receiving his MBA from CBS. He got a job at A.P. Möller, today the world’s largest container liner, in its newly formed marketing department. C6 at that time was an autodidactic computer freak. C6 liked very much to think about how science develops like rings in the water. New knowledge raise new questions, and then you get new experience that raise new questions. He liked for instance Darwin and Einstein. Much learning in classrooms are tests of one’s own hypotheses. Inspiring teachers and good textbooks are also valuable. Academic learning is very valuable – no doubt about that! C6’s eras were the business school where he also taught statistics at CBS, and then five years at A.P. Möller. Then he moved on to Copenhagen Business College. During his life there, C6 tried nearly every job including CEO, Study Counselor, and Chief Consultant for Int’l Relations. He also enjoyed experiential learning when he was teaching.
There is today a better balance between academic learning and experiential learning. We can talk about experiential education where we bring practice into education programs in a kind of mixture. C6 likes Kolb’s learning cycle. The best way to teach people is to send them home with an unanswered question, because it forces them to reflect. A teacher encounters a student who hopefully has questions. The teacher brings in the right input. Class sizes are not a big problem as long as everybody can see and hear. The important thing is the interaction with the class where students can ask questions. Role models serve as experiential learning models, because they are not formally instructing the learner. C6 believes in bodily learning – we don’t only learn with our ears and eyes. Practical experience is very important – not least at the beginning of a study.

How does one assess experiential learning? In top of CVs, C6 can imagine using Adizes’ PAEI-model and then with simple conversation trying to assess whether the person fits into the job requirements. Of course you should first of all create a job description so you know what to assess against. Whether he is academically trained or autodidactic is not important. In many organizational systems you have to fulfill academic requirements, so you will look for that in the CVs. Even if those requirements were not there, C6 would look for high academic scores, because after all they are indicators of intelligence. Otherwise he would look at the CVs and see what activities the applicants have done. C6 refers to an article about multiple intelligences that is on his table. Besides the logical, mathematical and linguistic qualifications, these intelligences are very difficult to measure. The article defines eight forms of intelligence:

1. **Logical, mathematical**
2. **Linguistic**
3. **Bodily, kinetic**
4. **Intrapersonal (look into oneself)**
5. **Interpersonal (relationships)**
6. **Visional/spatial**
7. **Naturalistic (empathy for nature)**
8. **Musical**

Only the first two are normally tested. The other six he would determine from talking to the applicant and seeing him in action. As an example he refers to the American presidential election, where C6 believes that Obama will win, because he is “a one in a lifetime person.” He has the charisma – a big ‘I’ in Adizes’ model. He is able to integrate people. That’s why he will win. This cannot be measured – you have to see the person on a TV screen to see it. C5’s ABC model (Attitude, Behavior, and Character) is okay for
C6, but he sees it as just an S-O-R model, where the R covers Behavior, and the A and C go into the O, of the S-O-R model. Other parameters are important for assessing a person, such as looks, height, brain size, and scent. There are thousands of variables and parameters.

C6 agrees that unconscious learning is dominant. Our brain is built with 125 billions neurons. When we learn something, each of these neurons can take inputs from 5,000-10,000 other neurons through chemical processes and send signals to 5,000-10,000 other neurons. We cannot imagine the immensity of the possible correlations. The brain is a dynamic mechanism that structures itself all the time. We learn all the time, even when we sleep. We learn when we are alone or when we organize our learning and use an instructor/teacher. The chemical processes, as described in the brain, go on all the time – and this is learning! A teacher is one you can ask questions of. It is my brain that works – it is me that learns. Our brain is able to make models of reality. A model is a selection of chosen parameters in which we have made concepts and relationships. All the time we need unknown parameters, and our brain is good at estimating these parameters and relationships. Some years ago we believed that the world was flat. Then we found out that we could alter that model.

C6 mentioned that Einstein’s brain was stolen after his death and put into a conservation medium. Recently it was found again, and with modern scanning techniques it was possible to find centers in Einstein’s brain that were extremely developed: mathematical and spatial intelligence. He was able to see spatial things mathematically. He said himself: “I am very much alone. Nobody is like me.”

C6 is a constructivist in the sense that it is the person that learns. You cannot say after a lecture that now the students have learned. C6 is a positivist in the sense that learning is a question of 125 billion neurons and each of them can take an input from 5,000-10,000 other neurons. That is C6’s model. Like the map of the genomes. C6 does not deny the environmental influence and the context. A rose can be big and beautiful in one condition of soil and light, but small and not so beautiful in other conditions – but it is still a rose! That is how genetics work. A poor pessimist will stay pessimistic even if he becomes rich.

What triggers shifts in career are often social things. A.P. Möller appointed C6 to go to Hong Kong to work in computer development, but his wife did not want to go abroad and
they had just had their first baby. Instead, he quit his job and went into education at Copenhagen Business College. Shifts are enormous learning experiences. They give you other perspectives in your perception of the world. You learn all the time. The moment you breathe you learn. Your brain is like a computer that works all the time. You can constantly learn because your brain has an enormous capacity and capability to learn. When we talk about learning, we break it into smaller parts so we can understand it. But this is not a realistic model of learning. It can be likened to annual accounts that we make for firms: we break these into years, because otherwise we cannot perceive them.

C6 pays much attention to practical matters in learning situations – especially in formal education. If you cannot hear what the teacher says or perceive his hand writing on the blackboard – or if he speaks unclearly or too quickly, your learning is hampered. Many teachers want to express their “personality” by mumbling, writing unclearly, or talking too quickly.

C6 thinks we stand in front of a mega development in the knowledge about how the brain works. We will be able to enhance learning processes by influencing the brain chemically and attach external memory, perhaps with surgery. Today we use knives, but at some future point we won’t use knives any more.

C6 would allocate 100 points to the three learning dimensions like this:

- Content: 33%
- Incentive: 33%
- Interaction: 33%

They are linked together. None of them can be omitted. It is like in chemistry. You have to reach a certain level before the chemical process starts. There has to be some motivation/incentive before learning starts.

The point of departure will be the job profile. You cannot talk about measuring without knowing what to measure. C6 would set up a meta-model, for instance the multiple intelligence model. C6 would make a 2x2 matrix with academic learning and practical learning in the front column and the eight forms of intelligence as mentioned before:
Items of practical learning are typically not measured. Experiential learning correlates with academic learning. With the right factor analysis, it should be possible to cluster factors within experiential learning – maybe into the dimensions of the multiple intelligence model. This is much like how psychotechnical tests are done.

C6 is fascinated with developments in science, especially medical and biological science. He believes we are in the front of a learning revolution where we can create and use artificial intelligence. It is a stage model where we can do extraordinary things in the future that we cannot imagine today.

Shortly after the interview, C6 sent an email with the following thinking:

“Immediately, I would express my assessment problem mathematically:

\[ Y = aX + bZ + e \]

(regression where \( Y \) = total learning score, \( X \) = experiential learning score, \( Z \) = academic learning score in an assessment process).”

He thinks this is possible, except that the model is linear (\( X, Z \) in first potent) and additive (there is + between \( X \) and \( Z \)). The “true” model that describes the total learning \( Y \) in the neural network which comprises 125 billion neurons, in which each can receive input from 10,000 other neurons and send input to about 10,000 other neurons can hardly be described by an additive and linear model. The model is quite likely multiplicative and non-linear (potential, exponential, etc.). Simple multiplicative models are known from economics (you take logs on both sides and get a linear and additive model). If the model is multiplicative, it will be difficult to make an assessment device because multiplication means dependence, i.e. that the effect of \( X \) on \( Y \) depends on the size of \( Z \). To estimate the effect of experiential learning, you must know the level of the person’s academic learning.
Table 7.13: The conceptual model for C6

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Prior education</td>
<td>M.Sc. 1970.</td>
<td>Lecturing in most subjects within the business administration area.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Lecturing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Consulting/Executive positions</td>
<td>Marketing at advertising agency. Marketing at A.P. Möller.</td>
<td>Nearly all positions at the Copenhagen Business College (CBC) including Study Counselor and CEO. Chief Adviser for CBC.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Training/counseling</td>
<td></td>
<td>Training program development.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Authoring</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Research</td>
<td>Market research in MEDA and South East Asia.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Incentive</strong></td>
<td>Influence from wife.</td>
<td>Different job opportunities in business college sector. Divorces.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Interaction</strong></td>
<td>C6 has held nearly every position in the business college sector and has had a constant broad contact basis.</td>
<td>Shift of environment to Thailand and frequent travels abroad.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Allocation of 100 points on:
- Content: 33
- Incentive: 33
- Interaction: 33

Allocation of 100 points on:
- Academic learning: 50
- Experiential learning: 50

C6’s USP:
- Has a master’s degree in operation analysis and theoretical statistics
- Very fascinated by the brain and research in brain functions
- Long career in education and education management
- Dynamic professional life

Comments of special interest:
- Believes in role models
- Body learning
- Adizes’ PAEI-model
- Zugarnic effect
- Multiple intelligence
- Genetics determines the scope of a person (the rose metaphor)
- Experiential learning correlates with academic learning
- \( Y = aX + bZ + e \) (regression where \( Y = \) total learning score, \( X = \) experiential learning score, \( Z = \) academic learning score in an assessment process)

Table 7.14: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C6

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance over time</td>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Stable</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C6’s master’s degree in operation analysis and theoretical statistics places him at a high level, as do his lifelong leading positions within the Danish business college profession. His dynamic life at the top of his profession has constantly given him incentives and has made him interact with this environment including institutions and ministries over all the years. The reason why the incentive and interaction have been increasing for C6 is his divorce around 1995, his subsequent marriage with a Vietnamese girl, their divorce ten years later, and his present life in Chang Mai, Thailand, with interesting assignments. C6 sees career shifts as enormous learning experiences. Please see Table 7.14.

Figure 7.6: Lifelong and lifewide learning for C6
C6 earned a master’s degree and then spent 5-7 years of practice forming marketing functions in large companies. After that he enjoyed a 32-year career at Copenhagen Business College where he performed nearly all functions in management including Study Counselor and CEO. He lectured on nearly all subjects within business administration. He functioned more than ten years as chief consultant for the college’s activities abroad. His period at Copenhagen Business College was a mixed academic and practice period. In his early retirement he is functioning as a consultant within the business world. Figure 7.6 illustrates.

Conclusion:
C6 has solid experience in the Danish business college sector as he was in the forefront of most developments there during a lifelong career until his shift to business as an early retirement option. From the very beginning he has been focused on the intellect, but his practice at Copenhagen Business College, where strong experiential learning educations were established in the 1970s, has also influenced him. He has strong pedagogical principles which he lives by in his own lecturing. He has been attracted to the business sector also – in fact he started there – and in his new career he successfully handles a variety of business advising jobs. This is an example of successful career shift of a person with solid academic and managerial training into another sector with high incentives for the career shift.

7.7 Case 7 (C7): Telephone interview from Singapore with Ambassador Emeritus, Adjunct Professor at Copenhagen Business School on 21 March 2008

The word students hear most from C7’s mouth is “why?” The students have textbooks and chapters to read before a lecture, but C7 does not lecture them outside the question “why?”, leading him and his students through the issues of the day. Why do things happen? What triggers the events? What will be the consequences? What will be the costs? To encourage students to reflect and ask questions, C7 has set up a forum page (homepage) where students can discuss and ask questions. It is not an interactive page, but C7 dedicates quite some time to it.

Illeris’ learning model with its three legs of content, incentive, and interaction appeals to C7. He finds the incentive leg most difficult. Students can get the content themselves by reading the texts, and C7 urges students to read to get good grades. Students should be
self-motivated: “You are here for yourself – not for me!” He motivates students to ask questions in a friendly atmosphere. It is important to interact with students and treat them equally. They very much pay attention to how the professor reacts to their questions and comments. You should not prefer any student from others. C7 does not see problems with large class sizes as long as there are possibilities for students to communicate with the professor in other ways – for instance through the forum homepage that C7 has set up.

C7’s business life era started after earning his master’s degree in Economics. He has from his childhood been interested in history and politics. He very early wrote about international currency problems. He started at the end of the 1960s during the dollar crisis. Why did it happen? He became interested in European integration. Again he asked “why?” Why did Denmark set up a decision model as they did? Why did the French have a very centralized model and the Germans a much decentralized model, and why did Denmark choose the French model? Extremely few people combine academic questions and practical questions. One exception was Henry Kissinger. Now C7 entered the scene along with him and wrote for international forums. C7 was one of the first to predict the economic power of Asia.

C7 learns from watching interesting people. He sees them as role models for himself. He looks at their successes and failures. Action learning is very important. He urges his employees to learn from watching him “in action.” Learn from his successes and failures. He has always tried to tell his employees why he has made the decisions he has. C7 does not believe in seminars and going to hotels for several days for employees to learn. At these places consultants are often hired to teach the employees. C7 has always fought against it. He believes strongly in the apprentice system.

People work basically well without supervision, but they are responsible for their actions. He teaches the employees the cultural-managerial profile of the company/organization: what we are doing and why we are doing it. People are expected to live up to that. When they have made two to three mistakes, they are asked to find another job. This is better than trying to change them and teach them. They can be skillful and function well in other jobs, but they do not fit into our philosophy of doing things. Our company has core activities (what are we doing), core communication (how we communicate internally, with customers, with suppliers), and core value added (why customers buy from us). If employees are not able to cope with these three simple questions, they do not belong to this company/organization and you should ask them to find another job. It is waste of time
to try to train them. The organization should create an environment, give them a chance, see how they react, and if not: ask people to find another job – even if it is not pleasant to do. But their competences fit in better in other jobs.

C7 has only changed career once in his life: when he left the Foreign Ministry of Denmark two years ago, after 38 years of service. C7 has always been able to do what he wanted to do. He has always supported his staff to do likewise, because you should do what you are motivated to do. C7 got his skills from Copenhagen University, studying for his master’s degree, but in top of this he has always read many books, studies, and newspapers. He subscribes to different international newspapers, and if interesting people are quoted he often tries to meet these people when he is abroad. Academic learning is important for increasing the box and being able to think outside the box. People without academic learning or learning acquired from reading are often not very interesting. A person should not be among the same people all the time because this would make it more difficult for him to think outside the box. If C7 should allocate 100 points to two boxes, academic learning and experiential learning, he would put maybe 80 of them into experiential learning – at least during his time in the Ministry. Academic learning is essential for making you able to digest experiential learning.

In assessing a person for a job, C7 would look at his CV, but it is in reality not telling so much. He would rather rely on personal interviews where he can determine if people can think outside the box, how interesting they are, and how much initiative they have taken.

C7 teaches his students three sentences of wisdom:

1. You will never get a second chance to make a first impression
2. There is no substitute for quality
3. There is only one way to achieve quality: hard work!

C7 evaluated the ABC model of personality like this:

Attitude means a lot: Is the person interested and engaged? Behavior: How do they react? Character: How genuine is their character?

For some years, C7 was part of an evaluation panel that hired new people for foreign positions. He liked to give applicants challenging questions, of the type without any correct answers, so he could see how they reacted as they tried to solve them.
C7 thinks much learning is subconscious. He agrees with Dewey’s learning model and Lewin’s T-Groups. In fact Lewin’s T-Groups remind C7 of his own teaching methods. He likes Kolb’s model, but asked for caution regarding the abstract conceptualization stage (stage 3), because people have a tendency to generalize. He is careful himself not to generalize, because things happen in a special context that does not lend itself to generalization. He thinks it best not to generalize experience, especially if you take time to reflect on things. He does not see hindrances for this picture because of the rapidly changing environment. Most often you can use what you learned in the past, because most of the differences are of a very general nature, so the same decision rules still apply. People’s patterns of reaction are pretty much the same today as they were in the past.

C7 has become a better decision maker over the years by reflecting on his previous decisions. He has always hated to waste time, but doesn’t see himself as a better time manager today than when he was younger – on the contrary, maybe.

C7 would allocate 100 points on the three learning dimensions like this:

- Content: 25%
- Incentive: 25%
- Interaction: 50%

C7 questioned the possibility of assessing experiential learning on a quantitative basis. He feels that would lead to conformity and hinder creative thinking.
Table 7.15: The conceptual model for C7

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior education</td>
<td>-1968</td>
<td>Master’s degree in Economics.</td>
</tr>
<tr>
<td>Lecturing</td>
<td>1968-2005</td>
<td>Adjunct Professor at CBS, Copenhagen. Adjunct Faculty, Singapore Management University. Lecturing.</td>
</tr>
<tr>
<td>Consulting/ Executive jobs</td>
<td>1998-</td>
<td>C7 has taken the entire route through the Ministry from private secretary to state secretary to ambassador.</td>
</tr>
<tr>
<td>Training/counseling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authoring</td>
<td></td>
<td>C7 very early established a homepage on the internet where he posts his own writing and hosts a discussion forum.</td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td>Publish thinking, contributions, and letters to press.</td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
<td>C7 has from childhood been interested in history and politics. He has always had an inner drive. C7 is challenged by interesting people.</td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
<td>C7 learns from watching people. Action learning is important. Freedom of employees under responsibility. Create a good climate and employees will flourish. C7 tests job applicants for their ability to think “outside the box.” He seeks interesting people and discusses issues with them. A very broad network through his top job at foreign ministry.</td>
</tr>
<tr>
<td>Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td>Formal education</td>
<td>Business career, Royal Danish Ministry of Foreign Affairs 1968-2005</td>
</tr>
</tbody>
</table>

Allocation of 100 points on:
- Content: 25
- Incentive: 25
- Interaction: 50
Allocation of 100 points on:
- Academic learning: 20
- Experiential learning: 80

C7’s USP:
- Open-minded and inner driven
- Bright
- Esteemed
- Lewin’s T-groups attitude
- A “why” person
- Learns from watching interesting people (role models)
- Heavy reader of books, studies, and newspapers all his life

Comments of special interest:
- Do not generalize, because everything is context based. Experience helps not to generalize
- Most differences are of a very general nature and you can use the same decision rules. People’s patterns of reaction are pretty much the same today as in previous time
- People should be with people other than their own group from time to time
- You cannot use quantitative assessment of experiential learning. This would lead to conformity and hinder creative thinking

Table 7.16: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C7

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td></td>
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<td></td>
<td>x</td>
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<tr>
<td>Low</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Importance over time</th>
<th>Increasing</th>
<th>Stable</th>
<th>Decreasing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

C7 has held positions at the highest level throughout his career in the Foreign Ministry of Denmark and has been state secretary and ambassador as well. He has also constantly participated in public political life as a writer for international newspapers such as The Times, International Herald Tribune, and Business Times. Although he has interacted at a high rate with environment, it has not had so much influence on him, as he sees that you
can use the same rules for making decisions in multiple environments. C7 has throughout his life lived at the same high speed, but in the later phase of his life professional challenges have been addressed – such as the offer for Adjunct Professor at Copenhagen Business School and his early retirement – giving him freedom for more professional offers. Table 7.16 illustrates the importance of C7’s learning dimensions over time.

<table>
<thead>
<tr>
<th>Age</th>
<th>90</th>
<th>85</th>
<th>80</th>
<th>75</th>
<th>70</th>
<th>65</th>
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<th>45</th>
<th>40</th>
<th>35</th>
<th>30</th>
<th>25</th>
<th>20</th>
<th>15</th>
<th>10</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Lifelong Learning</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Academic life</td>
<td></td>
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<tr>
<td></td>
<td>Lifewide learning</td>
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<tr>
<td></td>
<td>Business life</td>
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</tbody>
</table>

Figure 7.7: Lifelong and lifewide learning for C7

Figure 7.7: C7 is Master of Science in Economics (Cand. Polit.) from Copenhagen University and worked for the Ministry of Foreign Affairs of Denmark. He is now retired after 38 years of service. In his early retirement he is lecturing at Copenhagen Business School where he was appointed Adjunct Professor a few years ago. He also lectures at Singapore Management University (SMU), and he lives most of his time in Singapore. He constantly updates his homepage, where he also uploads his recent articles in leading newspapers worldwide. He is a member of several international forums of world politics.

Conclusion:
This respondent has a long career as a top manager in the Danish Foreign Ministry and has accumulated solid experiences in this position. He has a strong blend of incentives for academic learning and experience that he now excels in with his new career. He has been appointed adjunct professor, lectures at several universities, and is a busy column writer for international newspapers in business and political matters. He is a strong believer in experiential learning, but does not believe in just repeating old learning. On the contrary,
he argues for not generalizing, but making decisions based on context. He believes in fundamental values which should be reflected in decision-making. C7 is a good example of a person who has honored academic learning by remaining up-to-date on academic matters all his life and at the same time has performed at a high level in practice. His motivation for career shift as an early retirement option might very well be motivated by an early desire to do exactly what he is doing now.

7.8 Case 8 (C8): Telephone interview with Professor, Segal Graduate School of Business, Simon Fraser University, Vancouver, Canada on 26 March 2008

C8 thinks we learn by many means – by experimentation and trying things, by mistakes and doing it better next time. Academic learning takes place in the same way. C8 was born with a very good memory and has always found it easy to remember things. It is just luck – you cannot learn this. C8 believes in intelligence – sometimes you are lucky to have a bit of it. C8 thinks there are intelligences other than the two usually mentioned (logical/mathematical and linguistic). C8 thinks we learn most when we have to make choices. Other learning is memorizing. Volition to learn probably means something. In a class all students learn, but not necessary the same things. People hear what they want to hear. Some people learn by observing others. People learn what they don’t know.

C8 can subdivide his professional life into eras. The first when he left high school, where you learned because you had to. C8 earned his PhD because he found it necessary for an academic career. He took it pretty much as a driving license thing – not because he expected to learn much. Later learning was learning how to play the game. If you learn this, you can be successful – learning what the rules are and what the winning strategies are. C8 has only been in practice for a few years, and there he learned what not to do. C8 travels a lot and gives lectures around the world.

C8 found the Illeris model with Content, Incentive, and Interaction reasonable, although he was not too excited about it. He has not always felt that incentives are necessary. Competence for C8 was being able to perform at an acceptable level in a job. He would assess people by looking at their CVs, what they had done before, and their performance. If it was hiring a carpenter, he would like to see what they had built. Some are able to do things better than others, not because they know better, but because they perform better. Why someone is better than another is based on many things, for instance motivation, inherent ability, circumstances, background, personality, etc.
C8 thinks that experience is overrated. It really boils down to inherent ability. You can gain experience by doing the same thing for years. Twenty years of experience can be 20 times the same. We do learn from experience, but it is different what different people learn. Mere experience is sometimes only an excuse for hiring badly. Why shouldn’t, for instance, four years of good experience be as good as or even better than 20 years of not so good experience? You can have teachers at high schools who have taught for 20 years but who are still bad teachers. At C8’s institution there are experienced teachers who are really bad and young people coming directly from a PhD program who are really good. Giving a job to the most experienced can be completely wrong. You can take a donkey and you can groom it, train it, brush it, give it the best food, etc., but it will still be a donkey. That is the real problem with experience. Too much attention is given to it. People make the same mistakes in their personal lives again and again. Take for instance abused women who chose the same spouse or type of spouse the next time. C8 believes a person determines his own destiny. C8 finds it difficult to change a person’s personality, but maybe by some tricks you can do something. Culture means something. If you move to another culture you can learn more effectively. In some cultures, for instance, there is too much respect for the teacher, which hampers learning. You can unlearn your culture, which can make you a better learner.

C8 would be confident in hiring mature people, and also people without degrees, but it all depends on what job they would perform. In some jobs formal requirements must be fulfilled like at universities. In assessing a person, he would look at CVs and past performance. If it was a carpenter he would look at what he had built before.

C8 believes that you make your own luck. Things do not happen completely by chance. You cannot rely on fortune. External opportunities are circumstances a person can relate to and take advantage of. Not everybody can be lucky at once. If one is lucky another is unlucky. Fortune is involved too.

For experiential learning C8 would acknowledge “job assignments,” “moves between jobs,” “failures and traumatic situations” (to a lesser extent), “taking risks,” and “careers as an experiential learning voyage” as learning cases.

C8 has become a better decision make over the years – at least he likes to think of himself as such. He has become a better time manager and is also better at implementing things.
### Table 7.17: The conceptual model for C8

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior education</td>
<td>MBA 1977</td>
<td>PhD in marketing 1986.</td>
<td>PhD was like a “driving license” for academic work</td>
</tr>
<tr>
<td>Lecturing</td>
<td></td>
<td>Several awards for good teaching. Member at 15 Editorial Boards and Reviewer. Reviewer at 25 journals and 5 conferences.</td>
<td>In practice he learned most what not to do. Much motivation from different cultural environments in the three continents he has lived in. Successful lecturer around the world. “You make your own luck.” Inner driven.</td>
</tr>
<tr>
<td>Consulting/Executive jobs</td>
<td>Sales representative for one year (1973).</td>
<td>Positions in sales and marketing research.</td>
<td></td>
</tr>
<tr>
<td>Training/counseling</td>
<td></td>
<td>As a professor responsible for curricula.</td>
<td></td>
</tr>
<tr>
<td>Authoring</td>
<td></td>
<td>26 books/book chapters.</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td>215 journal articles in refereed journals, 95 published conference proceedings (C6 reviewed). 57 Professional journals and magazines. More than 100 various working papers, monographs and reports. Supervisor for 18 PhD students.</td>
<td>In practice he learned most what not to do. Much motivation from different cultural environments in the three continents he has lived in. Successful lecturer around the world. “You make your own luck.” Inner driven.</td>
</tr>
</tbody>
</table>

#### Allocation of 100 points on:
- Content: 20
- Incentive: 40
- Interaction: 40

#### Allocation of 100 points on:
- Academic learning: 20
- Experiential learning: 80

#### USP for C8:
- Very good memory by birth
- Bright
- Lived in Australia, South Africa and now in Canada
- Many awards as best teacher

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Comments of special interest:
- We learn when we make choices
- You make your own luck
- People learn what they want to
- C8 took his PhD as a driving license thing
- Learn the rules and the winning strategies
- C8 thinks that experience is overrated
- A groomed donkey is still a donkey
- People make the same mistakes in their personal lives again and again
- External opportunities are not luck – it is circumstances

Table 7.18: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C8

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance over time</td>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C8’s has a high level of content because of his academic training, PhD, and professorship. Incentive and interaction are set at the middle, because C8 is not especially governed by external incentives and he does not actively look for company consultancy jobs. He finds that you make your own luck and that environmental factors are just circumstances. Therefore, environment is set to the middle in Table 7.18.

Figure 7.8: Lifelong and lifewide learning for C8
C8’s only real practice period was a few years in sales jobs after completing his master’s degree. C8 has done extremely well in his academic career with an impressive production of academic papers. He has also done a great deal of teaching and won several awards for the quality of his teaching. He has been invited by several esteemed companies for management training and in this way been close to business life as well. This is illustrated by the horizontal marking in the business life column of Figure 7.8.

This case allows for more elaborated comments as a comprehensive CV was received too. An era analysis will be performed.

Era analysis – C8

1. Taking-off era
C8 received his business education in Pretoria, South Africa, ending with a PhD in Commerce in 1986. He received several study grants.

2. Business career era

Environment
Teaching and consultancy assignments have taken C8 to many parts of the world. He has lived in South Africa, Australia, and Canada.

Content
C8 was a sales representative for one year while he studied. Looking at his 33-page CV, there is nothing mentioned about his business career – it is all academic. He has only been in practice a few years, in positions in sales and marketing research. He has done consulting and in-house management development over the years for a number of well known international companies all over the world. He does that by invitation and is not promoting himself actively.

Incentive
In practice, C8 learned what not to do. His incentive for his PhD was “a driving license thing.”
**Interaction**
Learning is to learn how to play the game. If you learn that, you can be successful. Learn what the rules are and what the winning strategies are. Competence is to perform at an acceptable level in a job. Some are able to do things better than others. Not because they know better, but because they perform better – maybe because of motivation, inherent ability, circumstances, background, or personality.

**3. Academic era**

**Environment**
Born in the 1940s, C8 has lived through good times in academia.

**Content**
C8 has shown outstanding qualities in research as well as in teaching. He has written 215 journal articles in refereed journals, 95 published conference proceedings (peer reviewed), 57 articles in professional journals and magazines, and more than 100 various working papers. He has been supervisor for 18 PhD students. He has also written 26 books or book chapters. He is member of 15 editorial boards, and a reviewer at 25 journals and 5 conferences. He has received several awards for good teaching and best papers.

**Incentive**
C8 believes a person determines his own destiny. You make your own luck. Things do not happen completely by chance. You cannot rely on fortune. External opportunities are circumstances a person can relate to and take advantage of. Not everybody can be lucky at once. If one is lucky, another is unlucky. Fortune is involved too.

**Interaction**
C8 thinks that experience is overrated. It really boils down to inherent ability. We do learn from experience, but it is different what different people learn. You can take a donkey and you can groom it, train it, brush it, and give it the best food, but it will still be a donkey. That is the real problem with experience. Too much attention is given to it. People make the same mistakes in their personal lives again and again.

**Conclusion**
Looking over C8’s 33-page CV reveals an impressive academic career. He has earned several prizes for best papers and best teaching. He travels all over the world to teach
courses. He believes in inherent capabilities and utilization of circumstances. You create your own luck. When he is asked to allocate 100 points for academic learning and experiential learning, he allocates 80 for the experiential learning box. It means that he find experience important, which is also reflected in the big importance he gives to the interaction learning dimension.

Table 7.19: Gibbons and Hopkins’ scale of experientiality on C8

<table>
<thead>
<tr>
<th>Learning</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Prior education</td>
<td>x</td>
</tr>
<tr>
<td>Lecturing</td>
<td>x</td>
</tr>
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<td>Consulting/Executive</td>
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<tr>
<td>Training/counseling</td>
<td>x</td>
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<td>Authoring</td>
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<td>Research</td>
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<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
</tr>
<tr>
<td>Personality (ABC)</td>
<td></td>
</tr>
</tbody>
</table>

C8 has first and foremost gained his competence from his academic work. Experience within this field and his success has driven him far. His motivation is primarily inner driven. He has gone through all phases of the experientiality scale of Table 7.19.

7.9 Case 9 (C9): Interview with Professor, Luleå Technological University in Umeå on 28 and 31 March 2008

C9 is involved with a research project with sociologists. Learning by monitoring is to suddenly experience something – an “aha” experience – and then try to implement it. It is very close to experiential learning. If you have the fundamental theory in finance, you are able to analyze accounts. But it is not enough. You have to analyze many hundreds to become experienced. You understand the fundamental principles and then you acquire experience. We talk about intuition, but this is merely to use your experience in combination with your academic knowledge of how systems work. Then you start becoming wise. Sometimes it doesn’t work and we make mistakes. An example is the reindeer producing company in Lapland that mixed in 10% non-reindeer meat to cope with a shortage in reindeer meat. It was, of course, disclosed by wholesalers – and the company lost all its sales and went bankrupt.

Remember that you always by experience become wiser and wiser, but you cannot yourself claim you are wise. You have to refer to theoretical reference frames also,
because otherwise you cannot structure your new learning. You must have theoretical knowledge. Workers can only perform up to a certain level. A worker with theoretical training can go further. C9 has seen this, for instance with building workers (workmen).

C9 has had 12 different jobs and they form eras of his life. He has been very happy in all of the jobs except one, in which he had a bad boss. For instance, he spent seven years at Ericsson as a financial analyst, six years as a banker, and 12 years at USBE. C9 likes variety because he is curious. He is looking for something quite different from whatever he is doing today. He doesn’t like working in a bank because 95% of the work is the same thing day after day. Bankers are not allowed to take risks according to law. He doesn’t like the word “challenge,” because he links it to taking risks, and most people are not seeking risks. You will seldom take a job if you have 50% probability of failing. C9 has learned a lot from his 12 positions, even the one in the bank. In C9’s present research project he learns a lot from his colleagues and he has done so throughout his career. Interaction with extremely competent people is important for learning. Their research project is about why the Nordic countries are doing so well. They are at the top of all world’s rankings. The explanation seems to be the good qualities of the institutions. C9’s incentive to go from practice to academia was a drive to get away from his background. He came from a working class family but had always been fascinated by academic people; he watched them walking around with their books or laptops. He envied the people at the universities sitting there with their thesis papers. It was a boyhood dream to become one of them and call himself a PhD. He wrote his PhD dissertation while he was a banker. His advisers were Rolf Lundin and Leif Lindmark. Leif needed a PhD student and C9 became his first baby. They were very good advisers. When C9 was ready with his dissertation, Rolf Lundin offered him a job at USBE. When C9 came to USBE, his goal was to be docent.

The motivation to change jobs had many reasons – both private/social reasons and opportunities that came up. C9 and his wife were tired of big cities (Stockholm), his wife was from North Sweden, and they had their first baby. C9 also had his boyhood dream of earning a PhD. His most important skill is his analytical ability. His job at Ericsson as a controller was one of the first of its kind in industry. C9 likes figures, but he also learned that figures are only indicators. C9 tries to analyze and foresee things. He has a good sense of reality. He had worked 21 years in practice before entering academia. He finds academic learning extremely important to be able to interpret what happens in cases. The
more complicated the world becomes, the more important academic learning is, but you have to upgrade your skills all the time.

Entrepreneurs don’t see risks. It is the banker’s role to see risks. Every case is unique. C9 likes the Swedish words “they sag,” meaning they could see into the future. He likes visionary thinking. He likes the Mærsk slogan: “Rettidigt Omhu” (alertness and reflection) and he relates it to “commitment” – commitment to your industry and your nation. C9 is researching this at the moment through a case story from the chemical industry in Örnsköldsvik. On top of these qualities, there must be a driving force.

C9 doesn’t believe in tests for assessing people for positions, because tests cannot tell how a person will develop over the next 10-20 years. He will look at CVs to see what a person has done before. After that, he will see if the person “has his nose in the middle of his face.” He would find it insulting to ask a person with a degree to take an IQ test, but he might accept a language test. C9 believes that industrial wisdom is very important. For instance, if you are in the pulp industry you would hardly be good in for instance the shipyard industry. C9 likes the ABC model (Attitude, Behavior, and Character) very much. To this he would add industrial or necessary experience (right experience) for an older person, and then he would ask “What have you done?” and look at his CV. If it was a young person he wouldn’t care about the CV, because you can form or educate a younger person.

Quantitative assessment could be circles and squares you fill with qualitative labels. He finds the Illeris learning model too introverted – too closed. C9 set up a model as shown in Figure 7.9. C9’s figure more explicitly binds together learning from theory and experience and shows how this can lead to wisdom. Factors influencing this process are many and are summarized in the figure as a “force field.”
Figure 7.9: C9’s learning model

C9 also talked about how industry wisdom led to “recipes.”

Table 7.20: The conceptual model for C9

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturing</td>
<td>Lecturing in Accounting and finance.</td>
<td></td>
</tr>
<tr>
<td>Training/counseling</td>
<td>Developed the accounting and finance programs at USBE.</td>
<td></td>
</tr>
<tr>
<td>Authoring</td>
<td>Authored several books.</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>C9 started his PhD study during his engagement in the bank in Umeå.</td>
<td>Professor. Journal articles.</td>
</tr>
<tr>
<td>Incentive</td>
<td>A boyhood dream to earn a PhD. Born in working class family. Good advisers/mentors. Curiosity.</td>
<td>Exiting job.</td>
</tr>
<tr>
<td>Interaction</td>
<td>12 different jobs. Member of different regional business and cultural societies.</td>
<td>Academic world. Member of different regional business and cultural societies.</td>
</tr>
</tbody>
</table>

Time

Eras

Allocation of 100 points on
- Content: 33
- Incentive: 33
- Interaction: 33

Allocation of 100 points on
- Academic learning: 50
- Experiential learning: 50

C9s USP:
- Long practice career with solid challenges and management positions
- Reflective person
- Headhunted for USBE
- Professor at mature age
- Very strong inner drive to earn a PhD
- Wisdom (realkompetens)
- 12 different jobs (eras)
- A boyhood dream to earn a PhD

Comments of special interest:
- Believes in industry wisdom and recipes
- Theory is important for experience also
- C9 does not believe in tests. “The nose in the middle of the face” is better for future performance
- “lösandet och harvandet” (theoretical learning and repetition again and again in practice) creates results
- Entrepreneurs don’t see risks
- Academic learning is extremely important for interpreting practice, but it should be upgraded all the time
- C9 liked the ABC model

Table 7.21: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C9

<table>
<thead>
<tr>
<th>Level</th>
<th>Importance over time</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td>Stable</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C9 earned his PhD and went into practice. After 21 years in practice he returned to academia and became a professor in accounting and finance. He had a boyhood dream of earning a PhD and entering an academic career. He was lucky to have good advisers for
his PhD, in a period when USBE was newly established and the USBE management could pay attention to every individual on the small staff. His parents’ illness and his marriage to a lady from Norrbotten led him (back) to Umeå. Interaction with society was rich in his banking period and during his practical jobs. As a professor, C9 has to keep up-to-date (content) and interact with colleagues at seminars and conferences and C9 is constantly curious (incentives) and interacts with other researchers in teams from other universities primarily in Scandinavia (interaction). These personal characteristics of C9 put him high on all learning dimensions, and he has stayed high through life, why the importance over time is sat at “stable” in Table 7.21.

C9 has a USP in his practical wisdom and he believes in “lösandet och harvandet,” meaning that theoretical learning and constant repetition in practice are important for results. It creates intuition and industry wisdom, which C9 believes are important ingredients for mastering a professional position. In an assessment situation, C9 would look for these things, which are primarily found on a CV. Otherwise he would just see “if the nose of the applicant was in the middle of his face,” meaning pretty much the same thing as C4’s ABC model of attitude, behavior, and character, in a job interview situation.

C9 has a solid career from practice. He has split his professional life rather equally between academic and business life. He has had 12 different jobs in practice and has, therefore, tried several functions within the business administration area.
Further information, primarily a CV, made it possible to create an elaborate era-analysis of this respondent.

**Era analysis – C9**

1. **Taking-off era**

C9 comes from a working class family. He studied at Umeå University and earned his master’s degree in 1968. After that he continued with doctoral courses until 1974.

2. **Business career era**

   **Environment**
   
   C9 performed in the business environment in Sweden during the 1970s and 1980s, when the Swedish economy was in trouble due to devaluation of the Swedish krone.

   **Content**
   
   C9 went into business and stayed there for 21 years. He has had jobs at L.M. Ericsson in Stockholm (seven years), government administration, Chamber of Commerce, and in the banking sector (six years). His jobs were primarily analytical, but he also held managerial positions.

   **Incentive**
   
   C9 was very motivated to go to business. He had learned about the theoretical models and was eager to see them function in practice. He performed many studies for employers which led to structural changes in industries. He was also entrepreneurial in starting up the regional office in Umeå for the Chamber of Commerce. During his long engagement in the banking sector, C9 held important managerial positions (bank director). Learning by monitoring and having “Aha” experiences is important. To have theoretical knowledge is necessary and important, but it is not enough. You have to do things in practice again and again to get experience. Academic knowledge and much experience make you wise. Academic knowledge helps you to structure things and obtain knowledge at a higher level. C9 found banking jobs boring. He likes variation. One day should not be the same as the one before.
**Interaction**
During his industrial career C9 had much interaction with colleagues and in his banking days with customers. He was also selected for posts in professional organizations such as “Business and Society” and “Society of Economics.”

**3. Academic era**

**Environment**
When C9 entered the academic world at USBE in 1991, the business school was founded and in a consolidation phase. The 1990s were a period of growth.

**Content**
In 1991, C9 started his academic career by invitation from the dean of USBE, Rolf Lundin. He stayed 12 years at USBE before leaving for a full professorship at Luleå University.

**Incentive**
C9’s incentive to go from practice to academia was a drive to get away from his working class background and move into academia. He had always envied academic people walking around with their books and laptops. He wanted to be one of them.

**Interaction**
C9 has always interacted in professional and societal forums through board positions – for instance “Business and Society,” “Society of Economics,” SIDA, a few companies, and Umeå Theater.

**Conclusion**
C9 has held 12 different positions in his working life. He has gained solid learning from practice and academia, and his many positions have given him learning and wisdom from reflection. In Kolb learning cycle terminology, C9 has had many experiences from his jobs. He has reflected on those jobs and formed abstract concepts (new job opportunities) which he has tested (testing in new situations). In his professorship application for Luleå University, an important characteristic of C9 was his high standing in experience and the way he had combined it with high academic qualifications.
As seen on the experientiality scale in Table 7.22, C9 has taken all ten steps. His motivation and high personal qualities on top of his high theoretical education (wisdom) have raised him to the top of society. He believes in industry wisdom and recipes. C9 does not believe in quantitative assessment procedures when hiring people. A good CV and “the nose in the middle of the face” of a person are what matters. He believes that theory and experience work together to give you learning and with active reflection ultimately wisdom.

7.10 Case 10 (C10): Telephone interview with Research Executive, PhD, Prague, Czech Republic on 31 March 2008

Throughout C10’s professional life she has learned from experience. C10 received her master’s degree from Prague School of Economics, CR, in 1970. After that she went to a company to get experience for practical life, but C10 didn’t find this experience useful. C10 continued her education, completing her PhD in 1975. At that time she taught at the Prague School of Economics. Later, in 1991 – after the political and social change that took place in 1989 – she joined Czech Management Center at Celakovice, the first business school in the country. CMC was founded by the University of Pittsburgh.

As her previous education had not focused on market economy, she like other Czech colleagues went to the USA for “re-education.” She was Visiting Professor at University of Wisconsin, Whitewater, for one semester, where Professor George Tesar was head of the Marketing Department. In 1992, C10 went to Harvard University, Graduate School of Business Administration, Summer School, for a program in General Management.

Teaching appealed to C10 and she believed she was able to deliver what students expected from her. C10 began teaching marketing, marketing research and consumer behavior at a Czech-American business school 25 km outside Prague. The school had a
different culture than other schools. There were also practical problems for students wanting to attend, due to bad infrastructure. The content of the curriculum was different and the teaching was in English. The situation in Czech Republic was rapidly changing towards a market economy at that time. Secondly, American faculty members lectured at the school, and the students learned how an American professor would design a course – in C10’s case market research, consumer behavior, and marketing. The competitive situation changed. The market had become very competitive with regard to price. Other universities began offering courses and MBA programs at half the price of C10’s school. Students had also changed, becoming more demanding. More adult students felt the need for getting good MBA exams due to the demands of the market economy.

The first five years of the school’s life were successful. Then younger students came and they were less experienced, less motivated, and more demanding. On the other hand they were better schooled. The young students also had better opportunities to get scholarships and study abroad. The school’s ranking dropped from number one to number five (approximately).

C10 left the business school after seven years because she felt that practical marketing is different from the academic discipline. She went to a research agency and started to conduct marketing research for pharmaceutical companies. Clients wanted no sophisticated theory but practical solutions for their issues. C10 realized that she had to adapt to these requirements and found it interesting too.

C10 obtained her skills in marketing research from both school learning (her major) and from solving challenging problems in practice. She finds academic learning very helpful for solving practical problems.

C10 does not think that practical learning can be assessed quantitatively. Some companies do that in a simple way – they count years of practice, applying some coefficients for different previous job positions, industries, etc., but C10 prefers psychological testing of applicants that can map potential for practical learning.

C10 finds it problematic to try to separate school learning from practical learning. She believes that schooling gave her the necessary methods to approach problems. In practice she learned the most when clients asked for new solutions and she had to find them. The pressure forced her to learn.
### Table 7.23: The conceptual model for C10

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Era</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturing</td>
<td>Lecturing</td>
<td>Lecturing</td>
<td>Pressure to solve problems in practice.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consulting/</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive jobs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training/counseling</td>
<td></td>
<td>Founding member of Czech Management Center.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authoring</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td>Research papers.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td>Marketing research for global companies.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Allocation of 100 points on:**

- **Content:** 50
- **Incentive:** 25
- **Interaction:** 25
- **During central economy:** 50
- **After 1991 with market economy:** 33

**Allocation of 100 points on:**

- **Academic learning:** 60
- **Experiential learning:** 40
- **Academic career:**
  - 1978-97
  - 2001-03
- **Business career:**
  - 1970-77
  - 1997-2001
  - 2004-

**C10s USP:**

- Interchange of academic and practical professions through career
- Transform theory to practical, applicable methods for practice
- Pressure forces her to learn
- Re-educated to market economy
Comments of special interest:
- C10 does not believe in quantitative assessment of experiential learning
- Academic learning very helpful for solving practical problems

Table 7.24: Level of three learning dimensions and their importance over time plus the importance of environmental factors for C10

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Stable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C10 has a PhD in business administration (content level high). She stayed in the academic life for a long period before she went into marketing research in a marketing research company with international clients – especially within pharmaceuticals. The environment has meant a lot for C10, as Czech Republic changed its economy from centrally governed to market governed in the early 1990s. Academics within the economic field had to upgrade their educations and advise private companies of the new way of economic governance. Since the early 1990s, C10 has interacted more with the private sector and responded to the new market economic thinking in the environment. Table 7.24 illustrates how these factors have increased all three learning dimensions over time.

Figure 7.11: Lifelong and lifewide learning for C10
C10 earned her PhD from Prague School of Economics, CR. During her PhD studies she was also engaged in a retail chain for seven years. After a career in academia she went into a marketing research company, but went back to academia for a professorship for some years. Now she is back in the private sector as a research executive. Figure 7.11 shows C10’s “footprint”.

Conclusion:
This respondent is interesting in many ways – one of them because she has experienced the transition period in Czech Republic during the 1990s and up to now. This fact has influenced her and motivated her for further academic and experiential learning. She has been attracted to both academia and business and has performed well in both these professions. She has shown much flexibility during her career and likes the challenges of adapting theory to practice through the business advising profession she is currently in. She is a good example of a person who has been favored by both academic and experiential learning in a good combination through her professional life.

7.11 Summary

The ten cases in this chapter were presented as stand-alone cases. The research data were reported in a common form for all ten cases. It was possible to organize the data around eras of the respondents’ lives and at the same time identify the learning dimensions (content, incentive, and interaction) throughout the eras. Respondents estimated these learning dimensions’ importance for their “total” learning by indicating a percentage distribution for the three dimensions. A similar estimate was done for the divide between academic learning and experiential learning. All respondents are unique in their career path and some of their special characteristics or perceptions were reported under the metaphor of USP or under the heading “comments of special interest”. In the next chapter, Chapter 8 common factors and dimensions of the respondents will be described as they revealed commonalities too. The three learning dimensions content, incentive, and interaction were evaluated for every respondent for their levels and importance over time. There were made “footprints” of all respondents to give an overview of the respondents’ careers and how they have achieved their learning. Data for four cases made it possible to detail the descriptions more and add the Gibbons and Hopkins scale of experientiality.
CHAPTER 8
COMMON FACTORS AND DIMENSIONS

The purpose of this chapter is to “read” the results of the field research from Chapter 7. It has been an exploratory research guided by an interviewer-guide that in turn has been constructed from the knowledge about learning and experiential learning from the literature review in Chapter 4. If some common factors and dimensions can be found, this research has the opportunity to contribute to the field of lifelong career assessment. The chapter will report the research findings under the headings of learning, eras, some USPs and comments of respondents, learning from experience, and Why shift careers?
In this chapter, common factors and dimensions from the case studies will be highlighted. Some of the information made numerical representation possible and these are reported in tables. For qualitative data, overview is sought by using table form presentations too. Here similarities and differences will appear more clearly than through verbal description in the text only. The chapter is provided with subtitles to ease the comprehension of the text.

8.1 Learning

Respondents agreed that all three learning dimensions (content, incentive, and interaction) were important for learning. They allocated 100 points as shown in Table 8.1.

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Learning dimensions</th>
<th>Learning boxes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Content</td>
<td>Incentive</td>
</tr>
<tr>
<td>C1</td>
<td>25</td>
<td>40</td>
</tr>
<tr>
<td>C2</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>C3</td>
<td>5</td>
<td>40</td>
</tr>
<tr>
<td>C4</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>C5</td>
<td>20</td>
<td>30</td>
</tr>
<tr>
<td>C6</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>C7</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>C8</td>
<td>20</td>
<td>40</td>
</tr>
<tr>
<td>C9</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>C10</td>
<td>33 (50)</td>
<td>33 (25)</td>
</tr>
</tbody>
</table>

Overall, it is seen that the respondents paid considerable attention to each of the three learning dimensions and likewise to the two learning forms: academic learning and experiential learning. None of the respondents found the content dimension the most important. An interesting exception is C10’s evaluation of Czech Republic under central planning (figures in parenthesis). At that time the system was communist and did not leave much room for interaction in the business community and not much incentive to do so either. Otherwise, in a market driven society where competitive forces are in play, incentive and interaction are important dimensions. The interaction dimension seems to be valued highest by people with long experience from practice (C2, C7) or from strong external incentives (C3, C5). Incentives can be internal or external. “I learn a lot when I need to” (C1); “In practice I learned most when clients asked for new solutions and I had
to find them” (C10). Respondents distributed 100 points to show where their learning came from, and the results are shown in the “learning boxes” in Table 8.1. Here there are disagreements, but all respondents find both learning sources important. It can be difficult to discriminate between the two dimensions:

“During my professional career, how do I split academic and experiential learning? (Recall that I received an MBA and PhD in marketing while working as an engineer, which tends to raise the academic portion for me. This answer is also qualified with regard to my paper writing – I consider that activity, including the necessary reading, as experience even though the papers go to academic journals. Likewise, I consider preps for courses and seminars as experience even though they occurred in academic surroundings.)” (C1, 27 March 2008, by email).

Prior formal education in early years is very important and is valued by all respondents. They draw heavily on this learning and don’t regard themselves as capable of what they are doing without this prior education. They use experiences as tools in the learning process. Concrete experience can come from both business life and work in academia. Lecturing is academic work from which you can gain experience. In fact, in any profession people will get experience and they will learn from it, even if their profession is abstract conceptualization, as for instance in research jobs or lecturing jobs. C1 thinks, however, that “One thing that is difficult to learn by doing is teaching.” Why does C1 believe teaching is difficult to learn from practicing it? It might be because teachers normally teach alone, away from peers, and don’t get feedback from them. From this perspective, the interaction dimension misses. However, experiential learning is also about repeating activities, and in this way the teacher should become more skillful, but maybe it is difficult for him to develop himself without the interaction dimension of learning from peers.

8.2 Eras

There are three distinct eras in the material: formal education era, business career era, and academic career era. A fourth could be added, early retirement career, but this will often coincide with either a business career (C6, C10) or an academic career (C2, C7). Some of the respondents have shifted careers rather early in their professional lives (C1, C5, C8), others did it closer to the middle of their careers (C4, C9), and others shifted late in their
careers in connection with early retirement (C2, C6, C7, C10). There are often many reasons for career shifts, and a composite of reasons often applies. In some instances more dramatic environmental changes happen. Table 8.2 shows some main reasons of the respondents.

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Reasons for shifts in career</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Attracted to marketing and academic life.</td>
</tr>
<tr>
<td>C2</td>
<td>Dreamed from youth of an academic career. Serendipity.</td>
</tr>
<tr>
<td>C3</td>
<td>Wanted to interact with people. Divorce.</td>
</tr>
<tr>
<td>C4</td>
<td>Life as a successful rock musician with an unhealthy lifestyle in the long run. Divorce.</td>
</tr>
<tr>
<td>C5</td>
<td>Intrapersonal/interpersonal reasons.</td>
</tr>
<tr>
<td>C6</td>
<td>Divorce/early retirement.</td>
</tr>
<tr>
<td>C7</td>
<td>Always read a lot of international economic and political literature. In his early retirement he does much of the same as before, but his new career gives him time to focus on the academic side.</td>
</tr>
<tr>
<td>C8</td>
<td>Shifted geographical location (Australia, South Africa, USA) but only shifted career when very young. His three years as a salesperson were not successful.</td>
</tr>
<tr>
<td>C9</td>
<td>Boyhood dream of an academic career. Getting away from working class childhood.</td>
</tr>
<tr>
<td>C10</td>
<td>Turbulent environment.</td>
</tr>
</tbody>
</table>

Table 8.2: Major reasons for shifts in career

C8 sees experiential learning as making choices. The choices you make in your early years often bind you for the rest of your life. This also often means that you might regret your choices or at least think of your lost opportunities. At certain times in your life you might have a chance to change your life, and some seize the opportunity. It can be dramatic occurrences such as bereavement, divorce, or being sacked. In those instances you are in a situation of transformative learning where you are forced to address changes in your long term plans. This opens up new choices and a chance to fulfill old dreams. For respondents in an early retirement position, they often feel a new freedom to do what they have “always wanted” (C2, C7). Their private economy might be good and they don’t feel the same pressure to avoid a misstep that they felt in their youth. They also typically enjoy being free of employers or organizational hierarchical problems. They can capitalize on their experiential learning and be consulted because they have become wise. Their employability is in one way high, but in another way society prefers not to hire older workers because of physical deterioration and/or the belief that “old people cannot adapt to changes” and “they can only do it their way.”
Some people are driven by perceived shortages in their lives. These can be intrapersonal/interpersonal reasons or family background or a boyhood dream (C3, C4, C5, C9). “I needed to create something” (C3). “Am I happy? No. Am I unfulfilled? Yes. Am I understimulated? Totally!” (C4). “I felt a need for more academic work” (C5). “It was a boyhood dream to earn a PhD” (C9). A need can be defined as “necessity for a course of action arising from facts or circumstances.” (Shorter Oxford English Dictionary, 2002). Sometimes it is difficult to identify what arouses an individual’s needs, even for the individuals themselves. If a person feels a need, for whatever reason, it is a big motivator to act, and it becomes the driving force in his life. The motivational factor is essential in the learning models presented here, for instance the entrepreneurial learning model, Figure 4.1 (Rae, 2000); the USEM model of employability, Figure 4.2 (Knight & Yorke, 2003); and the Illeris learning model, Figure 4.3 (Illeris, 2007a).

Looking at the “footprints” of the respondents (the figures for each respondent showing lifelong/lifewide learning) it is clear that the shifts they have made have come from both directions: from business to academia (C1, C2, C5, C7, C8, C9), or from academia to business (C6), or both in and out of academia (C3, C4, and C10). Some of them stick to their profession without systematic and substantial work in “the other profession” (C5, C7, and C9). Some respondents work as professional consultants while also working in the academic profession (C1, C2, C4, C8). Some make a radical change in early retirement (C2, C6 and to some extent C7) after working as managers for many years. The footprints make it easy to visualize the career paths of the respondents. “Rather than focusing outward on some ideal generalized career ‘path,’ since it is driven by the person’s unique set of personal needs, the protean career is unique to each person – the ‘career fingerprint’” (Hall & Mirvis, 1995, p. 272). Individuality, as this quote reflects, is at the core of the Illeris (2007) definition of experiential learning, in that it is a “subjectively” balanced mix of content, incentive, and interaction. Individuality pervades Kolb’s (1984) thinking too in his learning cycle, where reflection holds a central place, in his model of growth and development, Figure 4.10, and in his model of integrity, Figure 4.13.

Concluding this era-analysis, it can be seen that there are different reasons to shift careers. Some shifts are driven by strong incentives (motivational) factors aroused by internal driving forces, and others are more motivated by external driving forces. Some seem to be aroused by a career path that did not deliver the expected excitement or that has outlived its attraction, and new challenges are sought. Whatever the reason for career shift, any
previous profession has given the respondent valuable experiential learning to transfer to the new career.

8.3 Some USPs and comments of respondents

In Table 8.3 some USPs of respondents are listed. These are dimensions that characterize the person. The USP is chosen to represent the marketing concept of Unique Selling Proposition, where a company proposes unique features or characteristics of its products or services in its selling proposition. Here the term is used in a more analytical way to characterize the person regardless of the USP’s “sales potential.”
Table 8.3: Some USPs of respondents

<table>
<thead>
<tr>
<th>Respondent</th>
<th>USP</th>
</tr>
</thead>
</table>
| C1         | - Two PhDs – one in engineering and one in business administration  
            - Likes a stable life  
            - Bright person who learns quickly |
| C2         | - Long practice career  
            - Cultural diversity  
            - Very active early retirement period  
            - Family acceptance of expatriate periods  
            - Bright person  
            - High level of energy  
            - Quest for academic acceptance  
            - Practical approach to things: what works is good – what does not work is not good (John Dewey, learning in school)  
            - Searches academic literature to structure things and use as frames of reference for practice, as when he formulated his own theory of cross-cultural business behavior |
| C3         | - Good in school – especially in math and physics  
            - In and out of research and management  
            - Strong personal conflicts from childhood and divorce  
            - “I was never very confident and never believed in myself. Unfortunately, this was one of my problems”  
            - “I need people around me. I need to feel it is useful in some sense”  
            - Highly respected academic and management person  
            - Opportunities in the environment when new institutions were built up  
            - Founding editor of Scandinavian Journal of Management about 1980  
            - Founding dean of Umeå School of Business (USBE)  
            - Had good mentors  
            - Interested in the notion of crises in organizations |
| C4         | - Multi-talented  
            - Intrinsic talented for psychology  
            - Radical career shifts  
            - Successful in whatever he does |
| C5         | - Apprentice in a grocery store  
            - Intrapersonal problem from birth to overcome  
            - Had good mentors  
            - Good external conditions – he feels lucky |
| C6         | - Has a master’s degree in operation analysis and theoretical statistics  
            - Very fascinated by the brain and research into brain functions  
            - Long career in education and education management  
            - Dynamic professional life |
| C7         | - Open-minded  
            - Inner-driven  
            - Bright  
            - Esteemed  
            - Lewin’s T-groups attitude  
            - A “why” person  
            - Learns from watching interesting people (role models)  
            - Heavy reader of books, studies, and newspapers all his life |
| C8         | - Born with a very good memory  
            - Bright  
            - Lived in Australia, South Africa and now in Canada  
            - Many awards as best teacher |
| C9         | - Long practice career with solid challenges and management positions  
            - Reflective person  
            - Headhunted for USBE  
            - Professor at mature age  
            - Wisdom (realkompetens)  
            - 12 different jobs (eras)  
            - A boyhood dream to earn a PhD |
| C10        | - Interchange of academic and practical professions through career  
            - Transform theory to practical, applicable methods for practice  
            - Pressure forces her to learn  
            - Re-educated to market economy |
Looking for common factors and dimensions of the respondents, all are very bright individuals. It is easy for them to learn. They all honor academic learning as a prerequisite for experiential learning. They have had incentives to make career shifts at various times of their lives. Some respondents did it early, some in mid-career, and some at the time of early retirement. All respondents have been exposed to foreign cultures, which seems to have triggered flexibility in their mindsets, widened their frames of reference in a good way, and might have helped them decide on career shifts. Larsen (2004) has “moves between jobs” and “careers as an experiential learning voyage” as important experiential learning factors.

The importance of interaction with other people is characteristic for the respondents. Expressions, such as “good mentors,” “role models,” “headhunted,” along with the natural interactions of working in business, show this. There were extraordinary external conditions in the environment that made shifts in careers possible. Whether this should be expressed as serendipity, luck, or circumstances is difficult to say. Interaction is central to action learning, which originates in Revans’ (1977) thinking and is echoed by Larsen (2004).

Respondents have given some interesting comments that are put together in Table 8.4. They can be regarded as reflections, experiential learning expressions, or steps towards wisdom. They represent characteristics that might be demanded in a recruitment situation. The learning might distinguish these people from others and make them more employable in concrete recruitment situations. Experiential learning is very important in management because this profession is about making decisions, and experience might cause the decision maker to make analogies to previous similar cases. This experience can then guide him in his decision-making. C7 warns, however, against making stereotyped decisions, because the environment changes all the time and a decision that was wise in one set of environmental factors in the past may not be right today under new combinations of environmental factors.
Table 8.4: Some comments of special interest by respondents

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Comments of special interest</th>
</tr>
</thead>
</table>
| C1         | - Performance = f(Motivation, Capability)  
- Performance = f(Experience, Learning)  
- Learning is how to take the next step  
- What you learn in an area you learn within two months. The rest is for becoming proficient or remembering what you have forgotten  
- Effectiveness (doing the right things) before efficiency (doing things still better)  
- One thing that is difficult to learn by doing is teaching |
| C2         | - Early in life C2 intended to earn a PhD and a Professorship but challenging job opportunities constantly arose and distracted him from that career  
- Opportunities were many when C2 went into business and his father motivated him to go for what interested him most  
- Experience is very important in business studies, but maybe less important for studying physics and other disciplines |
| C3         | - There was plenty of research money in the system in 1978 where C3 became associate dean  
- In natural science you can either prove or disprove a research question. There is nothing in between as you can have in social science in general  
- “A lot of people observe others. Not necessarily scrutinizing them – just observing them. What is going on?” |
| C4         | - Every child is a born genius (Einstein)  
- “God doesn’t expect us to be successful – but he expects us to try.” (Mother Teresa)  
- Educate: “to bring out what is in you” he takes seriously  
- The first of his books which was published in UK, The Powerfax Inner Management System (1990), is used by 150,000 managers worldwide  
- We should train what we are best at and do it again and again. That’s experiential learning  
- Believes in his ABC model (Attitude, Behavior, Character) |
| C5         | - In areas that interest you most, you are always disappointed  
- Influence of “good” people on his own character |
| C6         | - Believes in role models  
- Body learning  
- Adizes’ PAEI model  
- Zygarnic effect  
- Multiple intelligence  
- Genetics determines the scope of a person (the rose metaphor)  
- Experiential learning correlates with academic learning  
- $Y=aX +bZ +e$ (regression where $Y=total$ learning score, $X=experiential$ learning score, $Z=academic$ learning score in an assessment process) |
| C7         | - Do not generalize, because everything is context based. Experience helps not to generalize  
- Most differences are of a very general nature and you can use the same decision rules. People’s patterns of reaction are pretty much the same today as in previous times  
- People should be with people other than their own group from time to time  
- You cannot use quantitative assessment of experiential learning. This would lead to conformity and hinder creative thinking |
| C8         | - We learn when we make choices  
- You make your own luck  
- People learn what they want to  
- C8 took his PhD as a driving license thing  
- Learn the rules and the winning strategies  
- C8 thinks that experience is overrated  
- A groomed donkey is still a donkey  
- People make the same mistakes in their personal lives again and again  
- External opportunities are not luck – they are circumstances |
| C9         | - Believes in industry wisdom and recipes  
- Theory is important for experience also  
- C9 does not believe in tests. The nose in the middle of the face is better for future performance  
- “Lösandet och harvandet” (theoretical learning and repetition again and again in practice) creates results  
- Entrepreneurs don’t see risks  
- Academic learning is extremely important for interpreting practice, but it should be upgraded all the time  
- C9 likes the ABC model |
| C10        | - C10 does not believe in quantitative assessment of experiential learning  
- Academic learning is very helpful for solving practical problems |
There are expressions against making assessments quantitative and too formalized (C7, C9, C10). Gardner (2006) has the same reservations, as he thinks that quantitative and formalized assessments narrow the field of assessment to what is laid down in the assessment criteria. There can be valuable competences of applicants that are not taken into consideration then. Personal factors mean a lot for job performance (C4). Intelligence means a lot too and there are many forms of intelligence (C6); (Gardner, 2003). “Educo: ‘to bring out what is in you” (C4) can be done by interested and committed lecturers, role models, and mentors, and trained in practice. Experiential learning is to see how things function in practice and to repeat activities again and again (C9). Table 8.4 is, however, self explanatory. The comments point in many directions and it is difficult to put them on a common denominator. They give a form of “verbal footprint” of the respondents, because they will often express what excites them and what they have learned from life. Sometimes they might make the remarks because “in areas that interest you most, you are always disappointed” (C5).

8.4 Learning from experience

What is really common in these ten respondents? They have been motivated to make career shifts in life. Respondents shifting from business to academia frequently referred to their experience from practice. Their experience serves as a frame of reference in their academic work, and they will use that experience as much as they possibly can. Academics in their abstract conceptualization look for metaphors from practice to make their abstractions understandable. Going in the other direction, when academics shift to practice, these respondents seem to be happy with practicing their high level of academic learning (C3, C4, C6, C10). They find satisfaction in performing their academic learning in actual practice. Nearly all respondents have had strong relationships with foreign environments and this has widened their outlook.

Why is the interaction dimension of learning important? From Kolb’s learning cycle we know that reflective observation is part of the experiential learning process. When we are together with others we can observe them and try to decode their “secrets.” We can use them as role models, which was specifically well-versed by some respondents (C3, C4, C6, C7, C8). You can reflect on the role models’ successes and in some cases you can just copy their behavior and repeat it until it becomes a part of yourself (C4). Interacting with other people is to invite each other into both parties universe with their metaphors and living examples. It brings to you new perspectives from which you can learn. It should
not be forgotten either that personal contact has the additional advantage of perceiving with more of our senses and for instance read the body language of the partner. Interaction with people and artifacts can add experience to your body as well, because your body can “learn” too (C4);(Ilгерis, 2007). It must be expected that the respondents with solid expat experiences (C2, C4, C8) can confirm these types of learning.

Why is the incentive dimension of learning important? Life deals with satisfying needs and wants, as Maslow (1943) so insightfully described with his description of physiological and psychological needs. An individual must always learn how to satisfy his needs and wants, and apparently a human being has unfulfilled needs and wants through his whole life. All respondents honored this dimension of learning, although some respondents more saw it as an inner drive rather than something from the external world (C1, C8). “We learn all the time” (C4). “We accumulate knowledge all the time consciously and unconsciously” (C6). This must mean that both our unconscious and conscious learning is directed by our needs and wants. A psychologist would probably say that our unconscious mind is directed by needs and wants formed in childhood, but also from external events influencing us throughout life. This seems to be the case with several of the respondents if not all of them.

How can we prove that learning has taken place – the content dimension of learning? Very often we are not able to locate the time and space of our learning (Jarvis, 2007). To prove learning experimentally demands controlled experiments and for experiential learning it is nearly impossible, because you cannot control the external environment in a meaningful sense, as it is the composite of environmental factors that count in experiential learning (Kirkpatrick, 1977). We can, however, rely on self-assessment from people who stress the importance of their practice periods (Rae, 2000). Respondents also report major difference in lecturing in front of students with and without prior practice, and the value of allowing their students to practice (C2, C5, C9). All respondents paid much attention to the fact that neither of the two learning forms, academic or experiential learning, can stand alone for maximal learning. C8, though, stated that from his early practice he learned what not to do.

In Table 8.5, the learning from experience of the respondents is listed, along with the important things they have learned.
Table 8.5: Learning from experience

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Learning from experience?</th>
<th>What have they learned?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Early career as manager of engineering research laboratories and later business consultant.</td>
<td>What you learn in an area you learn within two months. The rest is for becoming proficient. Learning curve improvement in academic writing.</td>
</tr>
<tr>
<td>C2</td>
<td>28 years as manager for Sears and eight expat assignments.</td>
<td>Cultural diversity. Managing.</td>
</tr>
<tr>
<td>C3</td>
<td>Long career in managing positions in business school sector.</td>
<td>Learns from interaction with other people.</td>
</tr>
<tr>
<td>C4</td>
<td>Career as rock musician and later business consultant. Felt understimulated.</td>
<td>ABC model most important. Everybody can learn most things about a profession if they are motivated.</td>
</tr>
<tr>
<td>C5</td>
<td>Early career as business consultant and a consultancy job at Samoa Islands.</td>
<td>Cultural diversity. Transference of experience to developing countries.</td>
</tr>
<tr>
<td>C7</td>
<td>38-year career in Danish Foreign Ministry.</td>
<td>Learning from role models. No excuse for poor quality. A person should fit into a job early – otherwise he should find a job that suits him better.</td>
</tr>
<tr>
<td>C8</td>
<td>Lived in three continents and much lecturing practice.</td>
<td>Cultural diversity. You create your own luck.</td>
</tr>
<tr>
<td>C9</td>
<td>12 different jobs in practice before professorship.</td>
<td>Lösen och harvandet. Industry wisdom and recipes.</td>
</tr>
<tr>
<td>C10</td>
<td>Solid career as business consultant within market research.</td>
<td>Companies want simple, practical models to work from.</td>
</tr>
</tbody>
</table>

These answers seem to confirm the tripartition of learning. Experiences have given the respondents content, incentives, and interaction – the foundational ingredients of learning as Illeris suggested. It is important to state that experience also can be achieved from a life in academia. C1 regards academic writing and teaching as contributing to experience. C9 stresses the importance of repetition and the importance of knowing an industry from the inside. He thinks you gain industry wisdom that is important for performing optimally in a job – a belief that fits in well with many companies’ preference for internal recruiting – for instance Ikea, Hennes & Mauritz, and Skanska (Dagens Industri, 2008). It is as if someone working in the field perceives that experience teaches people to be humble about what works in practice, and sees this as basic wisdom. C7 expresses this sentiment by saying that: “Most differences are of a very general nature and you can use the same decision rules. Peoples’ patterns of reaction are pretty much the same today as in previous times.” Lifelong learning is valuable because it combines the learning dimensions of content, incentive, and interaction to grow and develop as Kolb (1984) showed (Figure...
4.10), and in his figure of “integrity as the master virtue integrating value and fact, meaning and relevance, and the specialized virtues of courage, love, wisdom, and justice” (Figure 4.13). In the author’s mind this figure is a masterpiece that shows how behavior in life should be governed in a balanced way between the ideals of value, meaning, fact, and relevance. The person who can do this must be very employable! The Bible expresses this with the words: “Then become faith, hope, and love. These three. But greatest of them is love.” (Bibelen, 1992, 1 Corinthians, Chapter 13, Verse 13, translated).

The interaction dimension of learning has gained new importance in the globalized world where companies increasingly recruit from an ever-growing base. Companies with subsidiaries abroad recruit from those, utilize their inherent diversity, and place the best applicants into jobs within the organization. C2, C5, and C8 have pointed out these possibilities and have themselves gained competence through expat positions abroad. Interaction within an organization can produce good experiential learning too. C6 and C7 have both had lifelong careers in one company, but they have tried nearly every function in these companies, giving them rich experiences as unique as performing these various functions in different (foreign) environments.

The respondents give the incentive part of learning strong importance. You do not shift career without being highly motivated, since such shifts have considerable risks, especially at the beginning or middle of a career as C1, C4, C5, C8, C9, and C10 did. But they had strong motivation, either externally (opportunity) or internally driven. It is interesting to see the importance of role models for learning. By observing respected managers, respondents learn. They observe and reflect on their behavior or simply copy them (C2, C4, C6, C7).

### 8.5 Why shift careers?

Table 8.6 gives an overview of career shifts and the reasons for making them. The special entrepreneurial behavior in shifting career has been analyzed. Many of the behavioral characteristics are found, for instance McChelland’s (1961) need for achievement, high internal locus of control, and need for independence and autonomy. Also, Rae (2000) points out important factors in entrepreneurial behavior, for instance personal values, motivation to achieve, setting and achieving ambitious goals, and personal theories derived from experience.
### Table 8.6: Shifts in careers and entrepreneurial behavior

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Why successfully shift careers?</th>
<th>Why entrepreneurial?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Personality characteristics made better fit to the academic world.</td>
<td>Successful shift to academia from an engineering research career into marketing via PhD in marketing.</td>
</tr>
<tr>
<td>C2</td>
<td>Externalities: Emergence of globalization made his expertise valuable. Narrow expertise, but difficult to master without learning from experience. First meetings with academia successful.</td>
<td>Shifted from practice to academia and achieved an outstanding career in both.</td>
</tr>
<tr>
<td>C4</td>
<td>Externalities: Experience from an unhealthy life as a musician. Internalities: Natural talent for psychology. Inner drive.</td>
<td>From a very successful life as rock musician to academia with PhD in psychology and successful author and human resource consultant.</td>
</tr>
<tr>
<td>C5</td>
<td>Externalities: Good mentor. Internalities: Need for achievement. Embarked on a subject in increasing demand (culture).</td>
<td>Went into academia by utilizing opportunities in the environment.</td>
</tr>
<tr>
<td>C7</td>
<td>Externalities: With more than 30 years in foreign ministry service, he has any chance to relocate and have knowledge of opportunities that fitted him. Internalities: Inner drive for achievement.</td>
<td>Esteemed writer in international business newspapers and forums. Nominated adjunct Professor at Copenhagen Business School. Early retirement career as academic writer.</td>
</tr>
<tr>
<td>C8</td>
<td>Shifted early to an academic career. Good memory and natural talent for teaching. Good fit for the academic world.</td>
<td>Pursues his need for cultural diversity, although strongly academic, through living in three continents and teaching all over the world.</td>
</tr>
<tr>
<td>C9</td>
<td>Externalities: USBE in establishment phase. Made a position open for him. Internalities: Boyhood dream of a PhD and being “one of them.”</td>
<td>Shifted successfully from 12 different jobs in business to academia and became professor.</td>
</tr>
</tbody>
</table>

Concluding this chapter, it seems to be possible to derive some common change factors of the respondents:

**Right vocation.** When a person embarks on a career in his youth, he is often not aware enough of his preferences and opportunities for a career. His behavior is reactive instead of proactive and he accepts a job offer just because it is there. In this way a young person
can start a career path that might not be the best for him. C1 changed jobs because of his attraction to marketing from a job in engineering. C8 found his sales jobs not especially exciting and went into academia. C4 found his rock music life unsustainable and found his right vocation in psychology. Finding your right profession probably gives you special well being. You know it when it is there. Not everyone has found his right profession and that might be one reason to shift careers as an early retirement opportunity. Another reason for this can also be a natural need for change in life. It is interesting that life often shows you your right vocation – normally the thing you enjoy doing most and/or are especially good at (C4). C8 has a very good memory and this is especially useful in teaching, which is why he excels in this with many prizes for best teacher. The voyage to your right vocation can take a trial and error route.

**External opportunities utilized.** Sometimes the stars stand right in the sky. An opportunity appeals to you and you are able to utilize it. This was the case for C5, who got a job on Samoa Islands that became the starting point of his academic career. It was the case for C2 with his job opportunity from Sears and later from his teaching job at Export Institute of Singapore. For C3 the interest in founding a business school at Umeå University was a great opportunity for a career. For C9 his invitation to teach accountancy and finance at USBE became his opportunity to pursue a career in academia. Utilizing an external opportunity is a genuine entrepreneurial trait (Kirzner, 1973).

**Inner drive for achievement.** Sometimes you need a psychiatrist to tell you from where a person’s drive comes. At any rate, it can be very strong and direct a person’s activity. C3 and C9 both came from working class backgrounds and this empowered them to work toward an academic career. C5 had a personal problem for which he sought to compensate. It seems that C10 felt attraction from both academia and business and alternated between the two. Sometimes external occurrences such as divorces can be an inner drive (C3, C6). Sometimes the inner drive is caused by a natural talent for something, such as C8’s talent for teaching or C4’s talent for psychology. Sometimes an inner drive can be a perceived shortage in status, as for C3 and C9. Inner drives are a question of degrees – everybody has them to some extent. McClelland (1961) in particular has pointed out the need for achievement as a characteristic of entrepreneurs.

**Need for change in life at a mature age.** People have a natural need for change. This does not, however, make all people entrepreneurial. These respondents had the entrepreneurial drive, confidence, self-belief and self-efficacy as well as known
capabilities in the form of existing skills and knowledge (Rae, 2000). A person who has spent a lifetime in one profession can easily be tempted to try another job path in an early retirement situation. C2 could finally pursue his plan from youth for an academic career, write books, and lecture at business schools and in companies all over the world. C7 from his early years was a heavy reader of history, politics, and economics is now a frequent writer in the newspapers he read. He has been appointed adjunct professor at Copenhagen Business School. C6 could in his early retirement finally try something other than the business college world, so he set up businesses in different countries and acts as business consultant for companies. C1 made a choice from his varied palette of activities through his professional life and now puts most of his resources into academic scholarship. On other occasions change happens because “the grass is greener on the other side” and you get into a trial and error situation (Lock & Hogan, 2000).

8.6 Summary

The respondents agreed on the importance of both academic and experiential learning. They feel there is correlation between academic learning and the learning effect of experience. It is also clear that all respondents had major but different incentives for career shifts. This research has shown the importance of interacting with colleagues and others for optimal learning results. The empirical results also seem to give evidence for Kolb’s theory of integrity (courage, love, wisdom, and justice) (Figure 4.13) as a balanced way to behave resulting from lifelong learning experiences.

The respondents were sampled from a universe of entrepreneurial people. It was clearly seen in their narratives that they have very entrepreneurial drives to succeed, such as inner drive for achievement and the ability to utilizing external opportunities. The sample of mature people also seemed to have a need for change in life in mature age. They want to embark on a new career – maybe because they believe another occupation fits them better – or simply as a matter of variation in life.
CHAPTER 9
DISCUSSION AND CONCLUSION

The chapter discusses the findings of the research and relates them to the aim, objective, and research questions of the study. The theories are discussed by bringing in the findings from the field study (the respondents) and common sense point of views. The chapter starts with repeating the framework for assessing candidates for jobs as it has been the overall framework for the study. Competence is a key word and the chapter opens up with discussing and concluding this concept. Experiential learning is another key concept that is a prerequisite for competence. It is discussed how experience has influenced respondents’ learning. Perspectives of lifelong learning are discussed. The problems of assessing lifelong experience are discussed in detail as it has been the aim of the study. The study is further concluded.

In the study, methodologies and tools were designed for assessing candidates for jobs. The most important of these are repeated in Appendix 5 to help the reader to get an overview of the procedure proposed in the study.
9.1 Competence

In this chapter the theory, conceptual models, analysis, and evaluation will be summarized. The writing has followed a framework centered on competence and company/organization’s demands for filling assignments. The concept of competence has been broadened in recent years to include more than specific knowledge and skills. To be able to assess competence it has been useful to look at the ingredients in competence (knowledge, skills, experience and personality) and also to look at the ingredients that form these competence criteria: learning and experiential learning. When employers assess competences, they have to know what can be assessed and how they can use indicators to assess competence and employability.

The overall framework of the research is shown in Figure 9.1. The concept of competence is explained and it is divided into knowledge, skills, personality, and experience. These constructs are achieved by a person by learning from school (academic learning) and from practice (experiential learning). A company or organization has requirements for fulfilling the jobs offered, and the competence of the applicant should meet these requirements as fully as possible. For the company/organization to assess the competence of the applicants, they need assessment models to guide them and indicators for competence to help them in their assessment.

![Figure 9.1: Comprehensive framework for assessing candidates for jobs](image-url)
The assessment itself can be done by interviews, observations, tests, portfolios, or other means. It is important to know what facilitates competence by a person. How does he get his competence? What enhances it and what impedes it? In principle, learning can come from two sources: from education or from practice. Wherever learning comes from, it needs content, incentive, and interaction to take place. In academic learning, focus is predominantly on content. Here knowledge is “transferred” from textbooks and the lecturer. But for learning to take place, the learner has to be motivated to some extent (incentive), and he learns in a social context (interaction). For academic learning, the priority of the learning dimensions are symbolized in Figure 9.1 by the boldness of the arrows, and we see a quite unbalanced use of the three learning dimensions. In practice, meanwhile, use of the three learning dimensions is typically more balanced, as illustrated by the equal boldness of the arrows. The weight of the learning dimensions depends, however, on the endowments of the individual, since we all learn best with an individual mix of the three learning dimensions (Illeris, 2007), and since at birth we are individually endowed in a multiple intelligence sense (Gardner, 1983). From this, it follows that it is difficult to use standard assessment methods for assessing individuals for specific jobs. The model in Figure 9.1 is build up primarily by the theories of Illeris (2007) for learning/experiential learning, Kolb (1984) for experiential learning, and Knight and Yorke (2003) for assessment theory, but many other scholars have also helped to inspire the framework as shown in the theoretical explorations of Chapter 4.

The respondents are “entrepreneurial” persons in academia or business who have made a shift in career. Entrepreneurial learning and experiential learning have much in common. Looking at the Rae figure (Figure 4.1) reveals factors that seem to have been active for the respondents. We can see many similarities if we repeat the factors of the Rae conceptual model of entrepreneurial learning: confidence and self belief, personal theory, ambitious goals, values and motivation, known capabilities, relationships, and active learning. The sample respondents are confident in what they are doing. They believe in themselves and have self-efficacy although some of the respondents also report feelings of inferiority in some respects. But such feelings can also be strong motivators to achieve. They have all been entrepreneurial in an academic sense since they have shifted careers and wanted to succeed in their new careers. “The present age has made people realize the reality and potentiality of lifelong learning – now this is being taken for granted as we recognize that schooling is not the end of education nor of learning and that some forms of intelligence still continue to expand with learning experiences throughout the lifetime” (Jarvis, 2007, p. 210).
The literature study of entrepreneurship and experiential learning theory has shown that motivation is the Alpha and Omega for an individual to be entrepreneurial and to learn. It also shows experiences’ importance for entrepreneurship and learning (for instance Heinonen, 2007; Huovinen & Tihula, 2008; Politis, 2005; Rae, 2000). The empirical study of this research has shown this as well. Reflection is a vital part in learning. Individuals should be given time for reflection. It is not suitable, for instance, for educators to force theory through in crash courses and definitely not without relation to practice. Theory then becomes sterile and not rooted in anything. After all, theories are only abstract representations of reality, and the human brain is limited in its capacity to foresee interplay between factors. Practice will show how theory works and from this we can learn and gain input for higher order theory. Self-efficacy by the individual is also important for entrepreneurship and learning (Knight & Yorke, 2003; Rae, 2000). People should believe in themselves and organizations should promote this, for instance by praising employees often in a positive, happy atmosphere (C6). Some of the respondents have, undoubtedly, missed enough time for reflection, because a busy day with management kept them from it. This appears to be the case for C2, C5, C7, and C9, who all were busy managers before their shift to academia.

9.2 Experiential learning

Experiential learning methods have been extensively discussed in this study. It might be appropriate to sum up the definitions of experiential learning from different scholars in Table 9.1.
Table 9.1: Experiential learning definitions

<table>
<thead>
<tr>
<th>Kolb</th>
<th>Jarvis</th>
<th>Illeris</th>
<th>Larsen</th>
<th>Revans</th>
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<tr>
<td>Working definition of experiential learning: “Learning is the process whereby knowledge is created through the transformation of experience.” Kolb (1984, p. 38)</td>
<td>Lifelong Learning: “The combination of processes throughout a lifetime whereby the whole person — body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, beliefs and senses) — experiences social situations, the perceived content of which is then transformed cognitively, emotively or proactively (or through any combination) and integrated into the person’s individual biography resulting in a continually changing (or more experienced) person” Jarvis (2007, p. 1)</td>
<td>“Experiential learning can be understood as learning in which the learning dimensions of content, incentive, and interaction are involved in a subjectively balanced and substantial way.” Illeris (2007, p. 92)</td>
<td>Experiential learning: “A common denominator for any type of learning process based on human action involved in performing tasks (typically, but not exclusively) in a work organization, rather than by being enrolled in formal training programs.” Larsen (2004, p. 491)</td>
<td>“Action learning is a social process, in which managers learn with and from each other by supportive attacks upon real and menacing problems.” Revans (1977, p. 3)</td>
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Kolb is very concrete in his definition as he links experience to learning directly. Jarvis has no direct definition of experiential learning, but one of learning and one of lifelong learning. The latter gets closest to experiential learning in the form which is of interest in this study. Illeris looks at experiential learning as a balanced phenomenon where his three learning dimensions should be present in a “subjectively balanced and substantial way.” Larsen has a very practical definition as he thinks that learning outside school rooms are experiential cases. Revans stresses the “real” and “menacing” in decision-making situations as experiential learning cases. Both Jarvis and Illeris pay attention to the subjectivity in learning – it is a personal thing. For learning over a career, all the learning incidences of a person are accumulated and we can talk about lifelong experiences and lifelong learning as in Jarvis definition. The respondents in this study were chosen on the basis of a lifelong professional career and a lifewide perspective when looking at the origins of their experiences. All respondents have had some years in academia and some years in business, which makes this sample unique. In both these environments the respondents have learned by experience and the two environments have stimulated each other. However, in the future there might be more cases like this, as people may change careers more often, which is a recurring topic in current debate.
We can discuss what makes learning experiential and whether all learning in fact is experiential. Dewey talks about continuity and interaction, and it can be claimed that school learning functions in a Dewey-like way and that adding new abstract learning to old abstract learning is a form of using experience. Experience can also be looked at as repetition. “‘Lösandet och harvandet,’ meaning theoretical learning and repetition again and again in practice” (C9). Imagine that a person has to learn nonsense words. By repeating the words again and again he finally learns them, but it is in the abstract world – in his mind – without having opportunity to experience something real – to touch something. Is this experiential learning or not? It appears that experiential learning theory deals with how experience impacts learning. Scholars agree that reflection on experiences is important to improve one’s behavior in future situations (for instance Boud & Walker, 1993; Daudelin, 1996; Kolb 1984; Revans, 1977; Robinson & Wick, 1992; Seibert, 1999). For education and training it appears that reflection is important too and interaction between theory and practice important for learning (for instance Illeris, 2007; Nielsen & Kvale, 1999). Dewey’s theory of interaction and continuity favors learning by experience by being rooted in situational factors.

Most models of theoretical learning cannot include the multiplicity of environmental factors that is present in an actual situation. Decisions are always made in an environmental context and from this you can learn. In future decisions the individual will try to compare the situation with earlier similar situations and try to let these reflections influence his present decision for the better. Kolb (1984) described learning as an experiential process of four stages, and this model has more or less been the reference model for scholars’ perception of experiential learning. Many business education programs take in students without prior experience from business life. In a Kolb experiential learning context (please see Figure 4.6), it is easy to see how difficult it must be for students to perceive the theoretical learning when they have no business experience to reflect on. And then, according to the model, they should be able to form abstract concepts for testing in new situations. It appears that building in practice periods in education must be very useful.

We understand with help from metaphors. We cannot understand things we cannot imagine. Morgan (1986) writes: “Metaphor is often just regarded as a device for embellishing discourse, but its significance is much greater than this… For the use of metaphor implies a way of thinking and a way of seeing that pervade how we understand our world generally” (p. 12). We also understand with our body (Illeris, 2007). Looking at
traditional lecturing, students are sitting at tables in rows and listening to the lecturer. It is didactic learning where the lecturer talks about his issues. He delivers theory which is supposed to give meaning for the learner. But what happens if the learner has no experience in the field? Students can for instance learn names of cities around the world, but it can be difficult to remember them and place them in any context. If there is supporting knowledge related to the city, this helps students to remember them. If the student knows that UN has headquarters in New York, it helps him in remembering where New York is located. He might remember Maastricht because it is where the EU Treaty was signed and he knows that this town is located in the Netherlands. If the student has visited the town himself, it gives him a much more profound knowledge. Now he can relate to the city and his remembrance is more solid. Learning organizational theory can be very abstract if students have not worked in a company. Learning consumer marketing is easier because we are all consumers. Learning language is much easier in the natural environment of the language – not only because of more intensive training, but also because of artifacts in their natural environment that are related to the language. A visitor interacts with this environment and it means something substantial for his learning. To an extent, it can be likened with making a pharmaceutical pill. You start with a small blend of active substance and then gradually blend it with fillings to the final volume of the blend. Lecturing is very much like this. The active ingredient (academic learning) is not enough; it has to be blended with filling material (experiential learning) to achieve a proper substance and form. All the respondents have solid experience from practice and acknowledge the great importance it has had.

Undoubtedly, the computer era, in which people have had difficulties learning the new technology, has been an eye opener for adult learning. It has shown that adults can learn and that young people and adults can learn together – also in the same environment – be it a workplace or a classroom. The two groups often fertilize each other. Also the emergence of flatter organizations favors this development. In these organizations, more senior executives meet younger ones more often, and there is an exchange of the younger people’s more updated theory from their recent schooling with the seniors’ more extensive experiences. With the rapid development of technology, immigration, and egalitarianism, it is increasingly common that people at workplaces or at training courses or in schools are of different age, nationality, and profession. It is increasingly accepted that the level of knowledge within the training field can be quite varied. It depends on prior schooling, culture, and experience. This has given adults more confidence, because they increasingly realize that their lack of knowledge in a field is
not because they are dumb or old, but only the fact that they previously had not acquired the knowledge in school or by being in a context where they could have learned by experience.

Experience can sometimes make a major difference in perception. An example will show this. There was a car dealer who built a very large car dealership. Once a year he arranged for local retailers to hold fashion shows and similar presentations in his showroom. He believed his gain would be to generate more traffic in his car dealership on other days, because just one visit to his premises would make people familiar with the place, making them likely to return when they were ready to buy a car. The car dealer showed good insight into learning. Even small things make people more confident and give them insight. At a course in Learning Environment, January 2008 at Umeå University, the participants tried several pedagogical teaching methods that gave practical experiences: group work, writing on a piece of carton, chat play, agree/disagree play, forum play, and project work. All participants were involved in these active methods. This was much better than just learning about the methods from literature.

On 17 April 2008, after a guest lecture at USBE by Professor Patrick Neumann from Ryerson University in Canada, the author asked him of his awareness of experiential learning. “We don’t speak about anything else at Ryerson at the moment,” he replied spontaneously. They have a whole department dealing with issues of experiential learning, and they have introduced the principles of experiential learning in their curricula throughout the university. The British business school, Henley Management College, has opened its first own education in Sweden in 2008. In an interview with Dagens Industri (24 April 2008), the rector Chris Bones is quoted as saying: “The traditional academy, undoubtedly, serves an important function, but it ought not to deal with MBA educations. The problem is that there is too much theoretical ‘snobbism’ and too little practical coupling. That we will change.” It is an ongoing debate at many business schools how to relate to practice.

The Illeris learning model consisting of content, incentive, and interaction seems to be rooted in the notion of a human being itself. It is interesting to compare these dimensions with the belief from The Bible, as in Table 9.2. The Bible reads: “Then become faith, hope, and love. These three. But greatest of them is love.” (1 Corinthians, Chapter 13, Verse 13). What is faith other than content – what we believe in? What is hope other than
incentive – the driving force of our activities? What is love other than interaction with other people?

Table 9.2: Learning dimensions contrasted

<table>
<thead>
<tr>
<th></th>
<th>The Bible</th>
<th>Knud Illeris</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faith</td>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>Hope</td>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Love</td>
<td>Interaction</td>
<td></td>
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</tbody>
</table>

The three learning dimensions (content, incentive, and interaction) that are studied in this research seem to be well chosen. A human being learns all the time until he dies (C4, C6), which reflects the thinking of Jarvis (2006), who also sees learning as happening all the time a human being lives; learning is intrinsic to living and it is essential to human life itself. It seems like it is what life is all about. Therefore we can talk about older people being wise. “They have had more time to learn than young people have” (C4).

“Wisdom…. It is precisely the whole that as person can create of his or her total experience and understandings and which, if it is weighty and important, can be regarded by others as practical common sense of a more immediate nature than the expert knowledge with which we are constantly confronted in the modern world. It is not everyone who can achieve what others acknowledge as wisdom. But it may nevertheless be a good expression for the type of learning many strive for in mature adulthood” (Illeris, 2007, p. 211).

The concept of longevity is also increasing with time. It means “long life, long duration of existence” (Oxford Dictionary of English, 2003) and most people are concerned about it. People want to live long and be healthy physically and psychologically until they die. Many people nowadays enjoy their retirement because they are healthy and can involve themselves in activities they haven’t had time to during their professional careers. Increasingly you see older people at evening courses and as frequent travelers. They want to learn (Baruch & Hall, 2004).

From the respondents it seems that the more they have been in practice, the more they value practical learning, but it is equally true that they to a great extent – and a maybe greater extent than the true academics – pay attention to their academic learning (C2, C10). Without that academic learning, they couldn’t see themselves in the career paths
they had gone through. But they recognize the value of experiential learning, because they can see what it has meant to them. “Lösandet och harvandet” (theoretical learning and repetition again and again in practice) creates results. (C9). “We should train what we are best at and do it again and again. That’s experiential learning” (C4, C9).

It is difficult to learn abstract things as is often the case in academic learning. According to Kolb’s (1984) theory, individuals are to different degrees endowed for abstract learning and we all have our learning styles. Theoretical understanding will, however, be strengthened if one can relate theory to practice. In learning we use metaphors – otherwise we have difficulty in grasping the theory. “It looks like dirty snow,” “it functions as a pair of scissors,” or “the flow is like a streaming river.” A person becomes proficient by experiencing theories functioning in practice and seeing them in different contexts. “What you learn in an area you learn within two months. The rest is for becoming proficient or remembering what you have forgotten” (C1).

Learning has many dimensions – in time as well as in depth. A person can learn in a short time or have a longer time perspective. A person can strive low or high for the learning outcome. A person can strive for detailed learning or more superfluous learning. It is interesting to look at the factors that are in force in a learning context. In the time dimension, experience throughout life adds to learning. Motivated people having visions and volition bring their learning to higher levels. People motivated to detailed learning succeed in learning details. “Learning is how to take the next step” (C1). “People learn what they want to” (C8). C4 refers to a quote from Einstein, “Every child is a born genius,” to say that people have the potential to learn a lot, if they are motivated positively or by pressure. When this is said, it should also be clear that different positions or jobs demand different competences of people and that different people are differently endowed to satisfy these demands. It was emphasized for instance by Gardner (2003) with his ideas of multiple intelligences.

Respondents have pointed out the importance of both academic learning and practical learning. You can reach further with a solid academic background because you have been trained in analyses and conceptualization. Therefore, the likelihood of finding better solutions to problems in practice is higher with some academic training. Training, on the other hand, is the hallmark of proficiency (C9). Imagine nearly everything you are doing how difficult it was the first time you did it. With repetition you become better in doing it.
Again it can be claimed that an “academic” understanding of the principles behind your activities will lead you to higher levels of proficiency (for instance C1, C2, C4, C9, C10).

Respondents have answered that a difficult thing to learn from experience is teaching (C1), and a teaching method much used is to ask “why” all the time (C7) or “to send students home with an unanswered question” (C6). A vital part of learning by experience is reflection, where you can ask “why?” Illeris (2007) calls reflection a special form of accommodation. “It typically comprehends material from different structures and takes place without any direct input of new stimuli from the environment (p. 254).” Knowledge that is in him but forgotten?

Experiential learning has several dimensions and the scholars mentioned in Table 9.1 have different contributions to the construct of experiential learning. What has become clear is that the time dimension can discriminate cases of experiential learning from something that takes place instantly in a decision situation, but it can also be something you reflect on over a longer time in a life perspective. The time span of experiential learning stretches from action learning to lifelong learning. This study has mainly focused on the lifelong learning aspect.

### 9.3 Lifelong learning

People learn from experience, but there are also decay factors in operation for a person throughout life. Figure 9.2 proposes these two variables over time.

![Figure 9.2: On the surface function of employability as a function of experiential learning and personal functionality](image)
Figure 9.2 shows that a person becomes more employable by experiential learning. Experience in itself is also a function of time. In particular, unconscious learning accumulates over time for a person (C4, C6). Employability is hampered by decay factors (C6). The biological decay starts in the early 20s (Jarvis, 1987) of a person and continues until death. For a specific person, his employability is a trade-off between experiential learning and decay factors. If the individual’s conscious learning is active and dynamic, the experiential learning can (more than) offset the decay factors and make the person even more employable.

The Swedish government plans to introduce a new education for vocational teachers. Many 30-40 year old people in a profession want to shift careers. To be a vocational teacher today demands a three-year education on top of the person’s vocation. Education Minister Jan Björklund thinks it is a belittlement of the vocational proficiency of the skilled person and he wants to reduce that time from three years to one year. He thinks that learning acquired in a profession is not inferior to learning at schools. The plan is accentuated by the fact that the plans of the social democrats to educate at least 50% of all born in a year to academic degrees has failed. A third of all Swedish 20-year-old students did not finish high school with a “pass” degree. Jan Björklund thinks there is a big demand in society for skilled workers and that not everybody should be academics. Nor do all people want to be academics. To reduce the education of vocational teachers from three years to one year demands assessment of the vocational qualities of applying teachers. According to Jan Björklund this expertise can hardly be found within the educational sector. The assessment has to be done by experts from the profession (Dagens Industri, 21 April 2008). This plan of the Swedish education minister shows how topical the issues of this research are with their focus on lifelong learning, shift of career, and assessment of competences.

In some public announcements diversity is praised. An organization should employ people of all ages, genders, ethnicities, and from a diversity of professions. The philosophy is that they learn from each other in networking processes. They can form teams and exchange knowledge and experiences (C4). Public organizations, for instance in some governmental offices in Denmark, have actively pursued rotation of employees to get the positive network effect. It can be argued that this effect will fade over time, when individuals have “delivered” their knowledge to the team, and they should, therefore, be placed in a new team so the process can start again. A career shift can be looked upon in
the same way. The model of the journey to performance excellence in Figure 4.11 (Wilkinson et al., 2002), and the model of managing the learning process over a career in Figure 4.12, illustrate these thoughts.

Shifting jobs is seen by many companies as a positive thing. A person staying in the same job and/or with the same employer is becoming more uncommon in the Western world, and even in Japan lifelong company employment is in retreat (C7). Shifting jobs means new experiences and from these you learn. Shifts can be inside a company as job rotation or a shift between companies. Sometimes it is good to “breathe fresh air.” Usually, you are humble in your new job. You are a “beginner” in the new learning process you enter, and this sharpens your motivation to learn. The saying that 20 years’ experience can be one year of experience repeated 20 times has some truth, and complacency can be the result instead of 20 years of steady improvement. Shifting jobs counteract this; shifting careers blows new life into your soul. It gives you new sensations and increases your motivation, which is one of the most important dimensions in learning.

9.4 Assessing lifelong experience

Knight and Yorke (2003) argue that assessment “is more complex than casual thinking might suggest.” They advocate that we need theories about what can be judged and how to do it (p. 209). Preconditions for assessment are an object for assessment and criteria to be used. The criteria have to be set up by stakeholders so that they cover the ground as well as possible. To the extent these criteria can be quantified, they should be, because this eases the selection process and the communication process as well. A special problem is that assessment criteria that represent the job in question are difficult to formulate. In an epoch of quality assurance programs in industry, formalized assessment systems are on their way into academia too. Standardization systems such as ISO 9000 and DIN are well penetrated into industries today and similar systems are now introduced into human resources management. The Swedish building giant Skanska is using standard systems in their recruiting to get away from recruiting “by gut feelings” (Dagens Industri, 28 April 2008).

For academic competences there have been assessment systems for decades in the form of exam diplomas and certificates. This is a summative assessment system that is widely accepted although not problem free. Assessing competence/employability demands company/organization formulation of criteria to meet company/organization goals for the
job. If these formulations are articulated and cover the field well, it is up to the applicant to describe his experience on those formulated criteria – or for the company/organization to use other methods to assess his competence. A lot of work is put on the applicant, but this can be a test of his seriousness and his mental strength. A senior applicant probably has created a database of his competence elements (knowledge, skills, certificates, experiences) already so that the work will not be so difficult for him.

This research has described in detail how an assessment system for experiential learning can be set up. Concrete systems have been shown. It has not been meaningful to concretely assess all respondents on a concrete job application, partly because the need for information exceeds what it was possible to get from interviewing the respondents and partly because it would hardly be appropriate to do so. But the system is described for companies/organizations to implement with their own definitions of criteria for specific jobs.

In essence, assessment is about confronting company claims for a job with candidates’ competences. To do assessments rationally and as objectively as possible, assessment models should be agreed upon. Appendix 5 summarizes the assessment methodology by showing the figures and tables developed, but at this place a verbal résumé will be given. Gibbons and Hopkins’ model for assessing experientiality was one model for scaling in candidates based on their experiential learning. The model incorporates personal growth, which is an important factor to assess, especially for mature candidates. It is also important to know candidates’ learning preferences. There are many tests on the market to determine individuals’ learning styles. The one indicated in the research is based on Kolb’s learning cycle. By assessing learning styles, it is easier to “pair” candidates with jobs facilitated by certain learning styles. In some jobs it is important to be analytical – in other jobs it is more important to be managerially competent and a decision maker. Competence is seen as a composite construct of knowledge, skills, personality, and experience. These characteristics of a person are to a great extent acquired by learning processes by subjectively balanced use of the content, incentive, and interaction dimension (Illeris, 2007) in an experiential learning process (Illeris, 2007; Kolb, 1984).

When companies set up requirements for fulfilling jobs they should set up indicators for candidates that show the candidates’ capability within specific fields. An example of indicators (criteria) was shown for a medical doctor, and later an advertisement for a position as a marketing professor was shown. For assessing candidates in the assessment
models, Recruitment Model I and Recruitment Model I (Expanded), the conceptual model of this research with its three learning dimensions put into a time framework was used. With this assessment methodology, it was possible to assess candidates on the specific criteria that the company/organization has chosen to set up. The detailing can be as comprehensive as desired and possible to phase out. It was shown how different stakeholders could formulate criteria that respected their requirements for the job. The assessment example shown in Recruit Model II had formal, mandatory requirements, general criteria, specific criteria, and personality as main assessment requirements, and under each of those groups the criteria could be detailed further. Maximum points were allocated by the stakeholders and the assessment done by decision makers and/or assessors. Both validity and reliability of the assessment very much depend on the criteria set up and how clearly they are defined. The validity of assessment will increase if the assessment is done by professionals within the field and if they are trained well in doing the assessment (Deitte, 2008). Björnåvold (2001) further claims that the construct validity of well articulated assessments can be high even if content validity cannot be claimed.

The candidates’ levels of competence on the three learning dimensions (content, incentive, and interaction) were evaluated in three positions (high, middle, and low) at the time of assessing the candidates for assignments. The importance over time for these learning dimensions are assessed too, as they can have been increasing, stable, or decreasing. A candidate can, for instance, have increased his content level by taking an MBA, his incentive level by being motivated for a new career, or his interaction level by increasing social contact. In this way, credit can be given to a candidate who has developed his competence, for instance since earning his master’s degree in his youth. The incentive and interaction criteria are not specifically assessed in the example in Table 5.10, because this example is based on a concrete job advertisement (Figure 5.4). It would, however, be possible to set up criteria for these and to assess them as well. This could be done by elaborating on the criteria in Table 5.8.

For lifelong careers the “footprint” in Figure 5.2 can give a simple and quick overview of candidates. The figure shows the candidate’s lifelong and lifewide learning by showing what he has been doing in his career. The left side of the figure portrays his academic life and the right side his business life. It will be easily perceived which route he has taken throughout life within the two fields and we have, therefore, a footprint of his career. Sometimes the candidate has had a foot in both camps and this is shown as a striped area.
Table 5.5 gives the “footprints” body by detailing and summarizing candidates’ experiences over their life careers.

By using the assessment methodology developed in this research, it is possible to assess a person’s lifelong career and to use these assessments in recruitment situations. The models have given directions for selection procedures for shortlisted candidates. The models are based on learning theory – mainly experiential learning theory that is particularly important for candidates with a lifelong career and older exam certificates. The models have given special attention to the learning that has taken place in practice for people aspiring to shift careers. The respondents in the empirical study of the research are of this type, and they give evidence for being successful in their career shifts. With the assessment methodology developed in the research, employers have models and tools for more objective recruitment of candidates for jobs. It will be noticed that much qualitative information and self-evaluation is involved in assessment of lifelong cases. In retrospect, mature candidates should be able to describe and evaluate past learning incidents and put them in perspective. The validity of their evaluations can be questioned, but experienced assessors report that cases of putting oneself in a better light than reasonable is usually easy to see through – for instance by the consistency in the descriptions (Fjellström, 2008).

Experiential learning theories are important for understanding learning from practice. They give a reason why and explanations why learning from experience is regarded as a vital form of learning. They also makes it possible to assess experiential learning by showing how experience can lead to learning and how much impact experience can have on learning. Using appropriate assessment models and tools will, therefore, be important for employers in recruiting situations. Assessing lifelong learning is a special case of assessment. Here the time dimension comes in and learning cases can be put into a time perspective. As learning is very individual, the assessment methodology must be able to handle the wide variability of individual cases. People with a lifelong career behind them have reached their present state through very different means of learning. Relying on exam certificates that might be 30 years old or more will not give valid assessment results. Another problem lies in the fact that all assessment will be on past achievements, but it is the person’s ability to function in a future assignment that is the issue of recruiting. Here is where evaluation of the candidate’s personality and motivation especially enter the picture. C9 denied the function of intelligence tests of mature candidates with a lifelong career and would rather evaluate “if the nose is in the middle of
his face.” C4 would put overwhelming importance on ABC (Attitude, Behavior, and Character) in his assessment of a candidate for future jobs, because “research shows us that most of us can do an adequate job by using 60% of our skills and talent. The other 40% is not mandatory – it’s voluntary. We will go the extra mile because we want it.” This means that personal factors and motivation for the new job should be given utmost attention and weight. It is, however, possible to give quantitative expression of personality assessment as was shown in the personality model, Table 5.9 and the recruitment model, Table 5.10.

A useful assessment tool to produce information for assessment of lifelong learning cases seems to be the portfolio. Whether this portfolio should function as the candidate’s database from which he can retrieve data and information that is demanded by the employer, or it should be his application format explicitly, is normally up to the employer to specify. Most often the employer will set up requirements for a position, and it is up to the candidate to tailor make information (data, essays, narratives) to meet these requirements, whether in written form or during interviews. Personality and motivation are paramount for fulfilling a future job, and therefore it is often desirable to meet the candidate in person. Here the candidate’s attitudes, behavior, and character can be assessed together with his motivation and vision for the new job. Where more assessors are involved, personality assessment can be done in a quantitative form using scales of personality factors as shown in Table 5.9. By combining this assessment with the assessment of the past achievements as in Table 5.4 and/or Table 5.5, a complete quantitative assessment of a candidate in a lifelong career context can be done.

What characterizes this research is its longitudinal nature. It assesses lifelong careers. In doing that, it is not enough just to make a traditional summative assessment of exam certificates and to look at CVs. The outcomes of the candidates’ activities should be more comprehensively explained. In this research’s field study, the respondents were interviewed using a questionnaire guide focusing on the learning dimensions of content, incentive, and interaction in addition to models of experiential learning. The narrative research method was used and the respondents told their stories. Through theoretical literature review, the importance of learning by experience has been highlighted and the data from the respondents used to give evidence from these theoretical explorations. For assessment purposes, a methodology was developed to be a framework for treating the data and two concrete assessment models were set up. These models will be very useful in practice. The comprehensive interviewing of the field research should be replaced by
collecting portfolios from job applicants. The requiring company/organization should set up claims/requirements for the jobs. These claims will in practice be difficult to meet, if candidates do not have updated portfolios.

Candidates with lifelong careers will, in answering these claims, have the opportunity to describe their career in a holistic way. They have accumulated much learning and have opportunities to show integrity and wisdom by describing their achievements in an experiential learning context of content, incentive, and interaction. Through this insightful writing they should be able to convince the employer of the value they can offer. Often a candidate has been employed in more companies/organizations covering more industries and carries with him, therefore, the possibility to accumulate experiences across industries. Table 5.5 should allow assessors to get a useful overview. The incentive and interaction parts should be regarded as important to address.

The assessment methodology presented seems to be useful tools for recruiting people of the kind portrayed in the research for assignments and jobs. Each tool from this varied assortment gives a better understanding of the candidate’s competence. Taken together they give a more holistic picture of candidates’ competence. Reading the ten cases also gives an impression of how different the ten case persons are. A concrete job profile should give a good idea of fit between candidate and job. It is a quite comprehensive work to obtain all the knowledge of candidates as it appears in this research, but assessors will probably soon experience learning curves from repeated recruitment, making recruiting easier Practice will also show which tools are especially useful and which should be revised or eliminated.

One can only get so far in making assessments quantitative, because much behavior is context based. People can adapt to the context they experience, and their job behavior will depend on the environment they are placed in and the challenges they face. Typologies, for instance, can give some advice in evaluating people’s competence for jobs, but they can hardly be exhaustive. The final assessment of candidates can only be done by meeting them in person. No assessment method or test can equal the value of the face to face factor before the final choice of a candidate. But even here, it is also possible to use assessment tools to score candidates, which is especially useful when several assessors are involved (see Table 5.9).
By using Quantitative Recruitment Model II from Table 5.10 of this research, the employer can set up the job requirements in as articulated a version as he likes. He can be the demanding part. Much of the information and verification is left to the applicants, and therefore much of the information must be based on their self-assessment. As has been explained in this study, it is difficult to get proof for the fit between candidates and employer in a recruitment situation. One must be satisfied with the available evidence. The value of the evidence can be improved by using elaborated frameworks to assess the information/data and by using assessment models to prioritize and pick the best candidates for the jobs. This research has given such models and methodology.

The research has described a wide variety of theories of experiential learning. It has also described concrete tools for getting close to experiential learning in an academic environment, for instance at a college or university. This must interest the academic audience of this research. If it is possible to bring experiential learning methods into academia, the academic world might become the better of the two worlds. It is fruitful for theorists to interact with practice. For practitioners to interact with academia is also fruitful. The more frequent the interaction the better, although there should also be sufficient time to go deep within both worlds.

For the actual use of assessment all necessary procedures are presented in Appendix 5. It gives assessors the opportunity to apply the material to perform a comprehensive assessment.
CHAPTER 10
LIMITATIONS AND SUGGESTIONS FOR FURTHER RESEARCH

This ending chapter recognizes that not every stone is turned in this research. As they say sometimes after the TV news: “This is what we have chosen to bring.” The chapter will point at some of the areas that are chosen not to bring into this research. The research has been limited too – not at least because of the traditional constraints in research: time, money, and practical considerations.
This research has dealt with a sample of scholarly academics who have shifted careers to business, and business executives who have shifted careers to academia. Their perception of their experiential learning might differ from those of other segments and it could, therefore, be interesting to repeat the research for other segments, for instance for people who do more manual work.

In this research, models have been constructed for assessing professionals for positions in companies or organizations. The aim of the research has not been to perform concrete assessment of the respondents. One reason for this was that this would demand detailed design of assessment criteria for specific assignments that was not available. Another reason was that delivering valid and reliable data for the assessment procedure would involve respondents to an extent that was regarded as unacceptable for them. Much of such assessment would probably be self-assessment by the respondents. It could, however, be interesting to actually perform the assessment on sample people for further experience in the use of the assessment models.

For some issues, it could be interesting to go deeper into the analysis. The analysis has been explorative, where the aim was to get ideas for developing assessment methodologies and conceptualize the field. It could be interesting to make descriptive analysis based on a larger sample and use multivariate data analysis techniques on them.

In the theoretical field, there are areas that could be researched further, for instance the possibility to assess personality variables in a more elaborated form. Incentives and interaction dimensions of learning have been pointed out as important learning dimensions, but still they are constructs that are difficult to assess by means other than by opinions or statements by the respondents themselves about what they regard to have been important in their learning. By deconstructing the two constructs it might be possible to get closer to decisive factors behind learning and competence, and maybe through this also be able to make quantitative assessments of them.

Society – not least the business society – has become very global. It could be interesting to research the changes that have taken place within business and academia as a consequence of this and try to point at a trend in recruitment. The population of this research has been global and the sample is drawn from this population. It has been a convenience sample and it can be expected that this sample is more homogenous than a random sample drawn from the population would be. A more comprehensive study with the possibility of breaking the material down on cross-cultural criteria could reveal interesting differences. Also, the fact that globalization and other societal developments change human resource management could make longitudinal research interesting. Many countries fear a coming shortage of qualified employees, and this has triggered political interest in keeping people in the labor market longer. What consequences could this have on recruitment politics and recruitment criteria?
The areas of lifelong learning and staying employable beyond present pension ages are topical issues and will, undoubtedly, trigger much new research in the field of human management. If people shift careers, how can their experiences acquired in one sector of professional life be utilized in completely different sectors? Competences acquired earlier in life or from other sectors might be outdated in those specific sectors but still be employable in other sectors. What kinds of competence are generic and able to survive?

Experiential learning can be seen from different time perspectives. Generally, the concept has been rather undefined in a time perspective. Experiential learning actually covers a time span that includes action learning but also lifelong learning. Future studies might focus more on the lifelong aspect of experiential learning or include the entire time span.
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**Personal Interviews**


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Foo C. T. (2006) Associate Professor, Nanyang Technological University, Singapore.


Neumann, P. (2008) Professor, Ryerson University, Toronto, Canada, 17 April.


Appendix 1

Résumé of Licentiate Dissertation:

Content:
1. Introduction
2. Problem specification
3. Major theoretical foundations
   3.1. Experiential learning
   3.2. Assessment theory and methodology
4. Conceptual model
5. Research Methodology
6. Platform case

1. Introduction

The licentiate dissertation researched the renewed interest in experiential learning that is seen in communities today. The rapid industrialization from 1960 to 2000 strained the labor market, which wanted better-educated people and to get them faster. In the last decade, however, communities have realized that more schooling might not be the way forward and that learning in practice is a good supplement or substitute for school learning. Some problems arise in this context – one of them the possibilities of assessing learning from practice. Schools have used assessment methodology for decades in the shape of grading systems after oral or written exams. Here students are tested on what should be a cross-section of the theory they have learned during a course. An aggregation of all the course points gives the final grade for the total course/education. Corresponding assessment systems do not exist for learning from practice – experiential learning. They are, however, highly wanted because of the need to hire people for assignments and thereby to check their competences for the work. It is also questionable if the assessment systems currently in the school sector are good enough. They assess primarily the cognitive part of learning and not the behavioral and social parts, which are important in business positions.

2. Problem specification

The licentiate dissertation asks the research question whether it is possible through theories of experiential learning and experiential assessment methods to empirically test whether learning has taken place in relation to specific purposes. The object of research
was one person – the author – who in an autobiographical storytelling case should give evidence for the theories.

3. Major theoretical foundations

3.1 Experiential learning

In the licentiate dissertation the main experiential learning model was that of Kolb’s learning cycle, which is illustrated in Figure 1. The first step is to use one’s concrete experience to validate and test abstract concepts (1). We observe and collect information about our immediate experience and reflect on them (2) before we form new concepts and generalizations (3) to test in new situations (4).

![Experiential learning cycle](image)

Figure 1: Experiential learning cycle
Source: Kolb and Fry (1975).

The learning cycle is thought of as a continuous cycle and it can be started at any of the four elements. It is a model for understanding how learning processes work. It treats the learner’s subjective experience as being important in the learning process. The cycle proposes an iterative series of processes which underlie learning. The model can be used as a framework for educational programs and training.

Kolb (1984, p. 30) points out that a learner, to be effective, needs four different kinds of abilities:

1. Concrete experience abilities (CE): Involving him fully, openly and without bias in new experiences.
2. Reflective observation abilities (RO): The ability to reflect on and observe his experiences from many perspectives.
3. Abstract conceptualization abilities (AC): The ability to create concepts that integrate his observations into logically sound theories.
4. Active experimentation abilities (AE): The ability to use these theories to make decisions and solve problems.

It should be noted that a person, to learn in an optimal way, should have a good balance in these abilities. For instance it is not enough to be good at reflection (RO) – you should also be able to act (AE) – otherwise your personality could “degrade” into “verbalism.”

Kolb’s (1984) theory pays tribute to John Dewey (1859-1952), who explained experiential learning through his concepts of continuity and interaction. What we learn in one moment builds on previous learning (continuity) and interacts with the environment at any given time (interaction). Also Kurt Lewin (1890-1947) contributed through his experiments with T-groups (training groups). He encouraged group discussions and decision-making in an atmosphere where staff and participants treated one another as peers. It was groundbreaking at the time. They found that learning was better when there was dialectic interplay between trainer and trainees. Today this knowledge is widely used and linked to, for instance, theory Y management (democratic leadership) and 9.9 management (care of people and production). Piaget (1896-1980) contributed to experiential learning through his description of the dialectic learning process of assimilating experience into concepts and accommodating concepts into experience.

A contemporary researcher in the field of learning has, however, suggested a model that is chosen in the dissertation as the most valuable for setting up an assessment model, Figure 2. Illeris (2007a, p. 92) defines experiential learning in the following way: “Experiential learning can be understood as learning in which the learning dimensions of content, incentive, and interaction are involved in a subjectively balanced and substantial way.”

![Figure 2: Learning processes and dimensions of a career](image)

Source: After Illeris, 2007a, p.88
The *content* dimension contains knowledge, understandings, skills, abilities, attitudes and the like, and it is shown through the platform case how these elements are acquired through years of academic and business assignments. The *incentive* dimension contains emotion, feelings, motivation and volition. The social dimension of interaction, communication and cooperation are highlighted in the platform case through assignments at different levels in the business community and in different business cultures around the world.

### 3.2 Assessment theory and methodology

The licentiate dissertation introduces the Gibbons and Hopkins (1980) scale of experientiality. It might be relevant for assessing concrete learning outcomes and also a career. The scale is shown as Figure 3. As can be seen, the model has five modes with two steps each, making ten steps. There is a progression in the model towards still more advanced intellectual behavior by an individual.

![Figure 3: Gibbons and Hopkin's scale of experientiality](image)

Source: Gibbons and Hopkins (1980); Neill (2004)
When matching experiences with content, one must begin by establishing a range of experientiality for the unit. To facilitate the process, Gibbons and Hopkins (1980) have adapted this aspect of decision-making to the following hierarchy of experiences (here reproduced after Horton and Hutchinson, 1997):

- **Receptive mode.** Experiences, or representations of them, are presented to learners, who remain a passive audience throughout.
  1. *Simulated experience.* Learners passively experience slides, pictures, videos, and other simulations of reality.
  2. *Spectator experience.* Learners experience the object of study with all senses, but as observers.

- **Analytical mode.** Learners conduct field studies in which they apply theoretical knowledge and skill in order to study some event, analyze some aspect of the environment, or solve some practical problem.
  1. *Exploratory experience.* Learners are exposed to interesting sites and encouraged to explore the possibilities of the materials at hand.
  2. *Analytical experience.* Learners study field sites systematically, often applying theory to solve problems in practical situations.

- **Productive mode.** Learners generate products, activities, and services, either assigned or of their own devising.
  1. *Generative experience.* Learners build, create, compose, organize, or otherwise generate products in appropriate settings.
  2. *Challenge experience.* Learners are challenged to pursue goals of productivity and accomplishment.

- **Developmental mode.** Learners pursue excellence in a particular field by designing and implementing long-term programs of study, activity, and practice.
  1. *Competence experience.* Learners focus on a particular field, practice the skills involved, become absorbed in the activity, and achieve recognized competence.
  2. *Mastery experience.* Learners go beyond competence, developing commitment to a set of high personal standards of excellence.

- **Psychological Mode.** Learners learn to understand themselves and their relationships with others. They accomplish the tasks presented by their stage of development toward maturity and make contributions to the lives of others.
  1. *Personal growth experience.* Learners gain understanding of themselves as unique individuals and learn to direct their own activities effectively and responsibly.
2. **Social growth experience.** Learners become more socially competent with people of all ages and act in more socially responsible ways, using their accomplishments in service to the community.

The Gibbons and Hopkins (1980) hierarchy of experience discriminates between passive and active experience. It resembles the progression in learning of Blooms’ taxonomy of learning. In the last mode (psychosocial mode) it resembles the concept of social intelligence. It is pointed out that curriculum designers should view the hierarchy in relative terms rather than absolutes, because learning does not take place at just one level of experience. Higher levels of the scale build on learning on lower ends of the scale and a concrete learning situation will often involve several steps of the scale. Higher levels of experience will, however, require a more sustained number of defining elements (activities and skills). The development mode (competence and mastery) was for instance traditionally achieved through the apprentice system where an apprentice became a journeyman who maybe eventually became a master.

4. **Conceptual model**

The conceptual model of this research, table 1, is derived from the Illeris model, figure 2 (Illeris, 2007a).

<table>
<thead>
<tr>
<th>Dimensions:</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
<th>Eras</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Time</td>
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</tr>
</tbody>
</table>

Table 1: Dimensions in an experiential learning model

The conceptual model of this research

It will be seen from the model that an individual operates in a context of content, incentive, and interaction at any given time. Typically an individual will be engaged in assignments – the content dimension – of a certain longer duration connected to a project or a job. They often form a period in the individual’s life where he is pursuing a career until an incentive or an environmental occasion sends him in another direction. An individual’s life can, therefore, often be allocated into life phases or eras.
All activities are performed in an *environment* and you learn by interacting with it (Dewey, 1938). The environment has many dimensions, but the most important ones in the context of this research are the business environment and the cultural environment. The *incentives* are partly aroused by environmental influences, and partly by organizational and private influences. The *content* dimension describes the actual experiences the respondents have had – in this context primarily from assignments and job functions.

5. Research Methodology

The design is a description of how scores will be obtained. In this research a *storytelling method* is used as an autobiographical storytelling case. The analysis describes scores on single measures, for instance lectureship, and tries especially to identify relationships that may exist between scores across different measures, as shown in Figure 4.

![Figure 4: Empirical research activities of this study](source: Adapted from Schwab, 2005 p. 7)
6. Platform case

The case describes the professional life of the author using the research design from the preceding chapter, and the theory and models developed in previous chapters. The measures as listed in Figure 4 have been thoughtfully assessed on Gibbons and Hopkins Experiential Learning Scale, as is shown in Table 2.

Table 2: Author’s experiences assessed on a Gibbons and Hopkins experiential learning scale

<table>
<thead>
<tr>
<th>Author’s experiences</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>1. Education</td>
<td>x</td>
</tr>
<tr>
<td>2. Market consultancy, Masius</td>
<td>x</td>
</tr>
<tr>
<td>3. Lectureship</td>
<td>x</td>
</tr>
<tr>
<td>4. Training program development</td>
<td>x</td>
</tr>
<tr>
<td>5. Books</td>
<td>x</td>
</tr>
<tr>
<td>6. Market research into foreign markets</td>
<td>x</td>
</tr>
<tr>
<td>7. Examination board</td>
<td></td>
</tr>
<tr>
<td>8. Exam commission</td>
<td></td>
</tr>
<tr>
<td>9. Managing</td>
<td></td>
</tr>
<tr>
<td>10. Board member</td>
<td></td>
</tr>
<tr>
<td>11. Mentorship</td>
<td></td>
</tr>
<tr>
<td>12. Book reviews</td>
<td></td>
</tr>
<tr>
<td>13. Own Consultancy company</td>
<td></td>
</tr>
<tr>
<td>14. Research</td>
<td></td>
</tr>
<tr>
<td>15. PhD courses</td>
<td></td>
</tr>
</tbody>
</table>

Source: Adapted from Gibbons and Hopkins (1980)
Table 2 shows that the author has progressed through the experiential learning scale through a multitude of steps over years. It will not be claimed that the highest level is reached where one “becomes exemplary community member,” but the steps in the model have been addressed by several means (assignments). For instance, Step 6: Challenge (sets difficult but desirable tasks to accomplish) has been achieved by market consultancy, Masius, lectureship, training program development, books, market research into foreign markets, exam commission, and research.

Information from the autobiographical case has been assessed and illustrative data put into the conceptual model with its learning dimensions (content, incentive, and interaction) and eras have been identified as is seen in table 3.

<table>
<thead>
<tr>
<th>Dimensions:</th>
<th>Analysis data put into the conceptual model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interaction with Environment</td>
<td>1960-76 Education. Starting up.</td>
</tr>
<tr>
<td></td>
<td>1977-2006 Growth in attendance to business education. Internationalization of curricula.</td>
</tr>
<tr>
<td></td>
<td>1991-2006 Need for international marketing/business textbooks in Danish language for growing business college market.</td>
</tr>
<tr>
<td></td>
<td>2004-2007 Professionalization of business schools with claims of PhD for lecturers, assistant professors, and above.</td>
</tr>
<tr>
<td>Incentive</td>
<td>Apprentice Business Baccalaureate M.Sc.</td>
</tr>
<tr>
<td></td>
<td>First job (Marketing consultant at international advertising agency).</td>
</tr>
<tr>
<td></td>
<td>Curriculum team for new education programs. Lecturer Program manager.</td>
</tr>
<tr>
<td></td>
<td>Feasibility studies in Singapore, Vietnam, Korea, Japan, Latvia.</td>
</tr>
<tr>
<td></td>
<td>Authoring and editing of six textbooks since 1991. Book reviews for business newspaper through 2 years.</td>
</tr>
<tr>
<td></td>
<td>Own consultancy company. Managing director at start-up company.</td>
</tr>
<tr>
<td></td>
<td>Lecturer at USBE. PhD position at USBE. Conferences. Doctoral courses. colloquiums. Lecturing at ESD Dijon, France.</td>
</tr>
<tr>
<td>Content (Factors)</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>2,3,4</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
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<td></td>
<td>5</td>
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<td></td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Time</td>
<td></td>
</tr>
<tr>
<td>Eras</td>
<td>Taking Off era</td>
</tr>
<tr>
<td></td>
<td>Curricula era</td>
</tr>
<tr>
<td></td>
<td>Country research era</td>
</tr>
<tr>
<td></td>
<td>Book authoring era</td>
</tr>
<tr>
<td></td>
<td>Business life era</td>
</tr>
<tr>
<td></td>
<td>Back to academic life era</td>
</tr>
</tbody>
</table>
Six eras were identified: The taking-off era with education, apprenticeship and first job; the Curricula era with career tracks of curriculum development, lecturing and program managing; the Country research era with feasibility studies in South East Asia, Japan, and Latvia; the Book authoring era with the authoring of six textbooks; the Business life era with own consultancy company and engagement as managing director of start-up company; and the Back to academic life era with lecturing at USBE, enrollment in the PhD program and adjunct lectureship at ESD Dijon, France.

By looking at theories of experiential learning and through evaluating the author on different experiential assessment models, it was found that the research question could be answered positively. The platform case gave evidence for learning through the distinctive eras described. In the platform case, job experiences were highlighted that should enhance the learning of the person studied. These learning experiences were measured by the job functions performed by describing these job functions and how they had contributed to the person’s learning. It was then possible to use the framework of Gibbons and Hopkins to evaluate how these job assignments had contributed to experiential learning of a still higher order.
Box 16.1 Aspects of employability

The acquisition of disciplinary understanding and skills is assumed; note that their application is listed as 10.

A. PERSONAL QUALITIES
1. Malleable self-concept: belief that attributes (e.g., intelligence) are not fixed and can be developed.
2. Self-awareness: awareness of own strengths and weaknesses, aims and values.
3. Self-confidence: confidence in dealing with the challenges that employment and life throws up.
4. Independence: ability to work without supervision.
5. Emotional intelligence: sensitivity to others' emotions and the effects that they can have.
6. Adaptability: ability to respond positively to changing circumstances and new challenges.
7. Stress tolerance: ability to retain effectiveness under pressure.
8. Initiative: ability to take action unprompted.
9. Willingness to learn: commitment to ongoing learning to meet the needs of employment and life.
10. Reflectiveness: the disposition to reflect constructively on the performance of oneself and others.

B. CORE SKILLS
11. Reading effectiveness: the recognition and retention of key points.
12. Numeracy: ability to use numbers at an appropriate level of accuracy.
13. Information retrieval: ability to access different sources.
14. Language skills: possession of more than a single language.
15. Self-management: ability to work in an efficient and structured manner.
16. Critical analysis: ability to deconstruct a problem or situation.
17. Creativity: ability to be original or inventive and to apply lateral thinking.
18. Listening: focused attention in which key points are recognized.
19. Written communication: clear reports, letters, etc. written specifically for the reader.
20. Oral presentations: clear and confident presentation of information to a group (see also 21, 35).
21. Explaining: orally and in writing (see also 20, 35).
22. Global awareness: in terms both of cultures and of economics.

Box 16.1 continued

C. PROCESS SKILLS
23. Computer literacy: ability to use a range of software.
25. Political sensitivity: appreciates how organizations work and acts accordingly.
26. Ability to work cross-culturally: both within and beyond the UK.
27. Ethical sensitivity: appreciates ethical aspects of employment and acts accordingly.
28. Prioritizing: ability to rank tasks according to importance.
29. Planning: setting of achievable goals and structuring action.
30. Applying subject understanding: use of disciplinary understanding from the higher education programme.
31. Acting morally: has a moral code and acts accordingly.
32. Coping with ambiguity and complexity: ability to handle ambiguity and complex situations.
33. Problem-solving: selection and use of appropriate methods to find solutions.
34. Influencing: convincing others of the validity of one's point of view.
35. Acting for and/or justifying a point of view or a course of action (see also 20, 21).
36. Resolving conflict: both in interpersonal and in relationships with others.
37. Decision making: choice of the best option from a range of alternatives.
38. Negotiating: discussion to achieve mutually satisfactory resolution of contentious issues.
39. Teamwork: can work constructively with others on a common task.

Appendix 3

Psychometric Paradigm
- People do not change very much
- They possess attributes that can each be objectively measured independently of each other
- Individual attributes predict work performance
- Individual differences are the biggest single source of variability in performance
- Jobs do not change very much
- Jobs consist of a specific set of tasks
- Job performance can be measured in terms of output and value
- Job tasks require specific attributes
- Selection is by the organization of the applicant
- The main purpose of selection is to predict job performance
- The best performers are the most suitable employees
- The better the selection, the better the performance

Social Process Paradigm
- People are constantly changing
- How they view themselves is crucially important
- The self-perceptions are subjective and interdependent
- Work behavior is part of a process that involves social interactions and perceptions of their consequences
- A job is a changing set of role expectations and relationships
- These can often be negotiated by the jobholder
- Selection is by both parties of each other
- The selection procedure is a social process in which a relationship is formed and developed
- It involves information exchange and negotiation

PO Fit Paradigm
- Organizations, jobs, and the business environment are constantly changing
- As is the relationship between employees and employers
- It is impossible to predict the future with any degree of success
- Organizations need employees who grow and develop with them
- The fit between employees and employers influences how people grow and develop with the changing organization
- An employee’s fit is influenced by interactions in a large range of domains (e.g., job, profession, work/life balance, values, supervisor, team members)
- The complexity of PO fit means that it is usually not possible to isolate the specific factors contributing to prolonged high performance with any degree of success
- The interaction between people and work environments is the biggest single source of variability in performance
- The prime focus of selection for both parties is finding a relationship that is mutually beneficial
- There is no fit between the parties if it is not in the best interests of either party
- Employers seek to recruit “whole people”
- Employees seek an employer where they will thrive

Three recruiting and selection paradigms
Source: Billsberry, Gilbert, 2008, p. 245
Appendix 4

Question framework for Experiential Learning interviews

Instructions: Show Q.1, 2, and 3 for overview, but continue with Q 4 before detailing Q 1, 2, and 3

1. How would you break down your business life into eras (epochs)?
2. What have been the distinctive environmental factors in your eras (epochs) that have influenced you?
3. What have been the distinctive incentives in your eras (epochs) that have influenced you?
4. What is your main content (assignments) within each era? Attach your CV please. What proportion of competence used in each assignment is acquired by academic learning and what proportion by experience?
   a. Which skills would you say you have and how did you get them?
   b. Which competences would you say you have and how did you get them?
   c. Do you have competences that are not used in your present job and how did you get them?
   d. Looking at Gibbons and Hopkins’ (1980) scale of experientiality, how would you assess each of the ten steps for yourself in relation to learning by doing?
      i. Simulated experience
      ii. Spectator experience
      iii. Exploratory experience
      iv. Analytical experience
      v. Generative experience
      vi. Challenge experience
      vii. Competence experience
      viii. Mastery experience
      ix. Personal growth experience
      x. Social growth experience
   e. Henrik Holt Larsen proposes a frame of reference for experiential learning:
      i. Job assignments
      ii. Moves between jobs
      iii. Failures and traumatic situations
      iv. Taking risks
      v. Careers as an experiential learning voyage
      Do you realize this for yourself? How?
   f. Experiential learning scholars
      i. Dewey (continuity and interaction)
      ii. Lewin (T-Groups, B = f(P;E)
      iii. Piaget (assimilating experience into concepts and accommodating concepts to experience)
      iv. Does this make sense for your learning too? Please explain.
   g. Illeris and Kolb models of experiential learning. Do you acknowledge these models for yourself?
   h. All in all – on which occasions did you learn most?
      i. What has learning by doing meant to you for your competence in
         i. Implementation
         ii. Decision-making
         iii. Time management
         iv. Other competences?
5. If you should make two boxes, one for academic learning and one for practical learning, what would you put into each of them for the most important learning occasions?
   a. Has something been difficult to learn by doing?
   b. Which factors favor experiential learning and which factors have negative influence?
Appendix 5

Summary of recruitment methodology and tools used in this dissertation

Summarizing, the procedure for assessing mature candidates in recruitment situations could be like this: make a “footprint” of the candidate as in Figure A.1 to get an immediate impression of his lifelong and lifewide career.

Get an overview of the candidate’s learning through his career by putting in the candidate’s data into the conceptual model in Table A.1. This gives an overview of the candidate’s learning through important eras of his career.

Figure A.1/Figure 5.2: Lifelong and Lifewide learning for Candidate X
Table A.1/Table 5.5: The conceptual model for putting in respondents’ data

| Dimensions     | Eras | | |
|----------------|------|---|---|---|
| **Content**    |      |   |   |   |
| • Prior education |     |   |   |   |
| • Lecturing    |      |   |   |   |
| • Consulting/Executive jobs | |   |   |   |
| • Training/counseling |   |   |   |   |
| • Authoring    |      |   |   |   |
| • Research     |      |   |   |   |
| **Incentive**  |      |   |   |   |
| **Interaction**|      |   |   |   |
| **Time**       |      |   |   |   |

Eras

Assess the candidate on the three learning dimensions and the environment factor to get an impression of his learning level and development in his learning over his career. Table A.2 is filled out for a hypothetical candidate.

Table A.2/Table 5.8: Level of three learning dimensions and their importance over time plus the importance of environmental factors

<table>
<thead>
<tr>
<th>Level</th>
<th>Content</th>
<th>Incentive</th>
<th>Interaction</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>High</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increasing</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Stable</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decreasing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Assess the candidate on the Gibbons and Hopkins experiential learning scale to portray his experiential learning and how far it has taken him. This should be done for content, incentive, and interaction criteria, and for personality criteria (attitude, behavior, and character) as well. Table A.3 is filled out for a hypothetical candidate.

Table A.3: Gibbons and Hopkins scale of experientiality for a hypothetical candidate

<table>
<thead>
<tr>
<th>Learning</th>
<th>Gibbons and Hopkins experiential learning scale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Content</td>
<td></td>
</tr>
<tr>
<td>• Prior education</td>
<td>X</td>
</tr>
<tr>
<td>• Lecturing</td>
<td>X</td>
</tr>
<tr>
<td>• Consulting/Executive</td>
<td></td>
</tr>
<tr>
<td>• Training/counseling</td>
<td></td>
</tr>
<tr>
<td>• Authoring</td>
<td>X</td>
</tr>
<tr>
<td>• Research</td>
<td></td>
</tr>
<tr>
<td>Incentive</td>
<td></td>
</tr>
<tr>
<td>Interaction</td>
<td></td>
</tr>
<tr>
<td>Personality (ABC)</td>
<td></td>
</tr>
</tbody>
</table>

Shortlisted candidates can now be assessed using Table A4, Quantitative Recruitment Model I (Expanded) through the criteria that the organization has set up. The assessment is done by allocating the candidates points according to the assessors’ evaluation from the maximum points that are set for each criterion. Each main criterion adds up to 100 points, as shown in Table A.4. The points for the main criteria are transferred to Quantitative Recruitment Model I as shown in Table A.5.
Table A.4/Table 5.7: Detailing of assessment criteria from Table 5.6
Quantitative Recruitment Model I (Expanded)

<table>
<thead>
<tr>
<th>Detailing the criteria:</th>
<th>Points (relative distribution)</th>
<th>Candidate on criterion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>X</td>
<td>Y</td>
</tr>
<tr>
<td>- Prior Education</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o PhD</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Master’s Degree</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Bachelor’s Degree</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Diplomas</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>- Lecturing:</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Lectured in subjects relevant for the job?</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>o Quality of lecturing</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Years of lecturing</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>- Consultancy/Executive positions</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Consultancy/Managing positions</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Years in managing positions</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Foreign contacts:</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>- Duration of stays abroad</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>- Expat experience</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>- Relevant countries for the job</td>
<td>(10)</td>
<td></td>
</tr>
<tr>
<td>- Training/counseling</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Program manager</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>o Education programs</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Study adviser</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Subject programs</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>- Authoring of books:</td>
<td>100</td>
<td>20</td>
</tr>
<tr>
<td>o Sole author</td>
<td>30</td>
<td>5</td>
</tr>
<tr>
<td>o Co-author</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>o Quality of book</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>o Relevance for job</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>- Research:</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>o Number of first author journal articles</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>o Number of co-author journal articles</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Quality of articles</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Articles with relevance for the job</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>o Prestigious journals</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

Scores for each candidate are multiplied by the importance weights of the criteria and summarized into total scores. The candidates are then quantitatively assessed, and prioritization can immediately be done and best candidate appointed.
### Table A.5/Table 5.6: Importance-performance table for shortlisted candidates

**Quantitative Recruitment Model I**

<table>
<thead>
<tr>
<th>Importance of criterion (weight)</th>
<th>Criteria</th>
<th>Candidate X</th>
<th>Candidate Y</th>
<th>Candidate Z</th>
<th>Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>Content</td>
<td>40</td>
<td>25</td>
<td>35</td>
<td>100</td>
</tr>
<tr>
<td>10</td>
<td>- Prior Education</td>
<td>33</td>
<td>33</td>
<td>33</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>- Lecturing</td>
<td>20</td>
<td>50</td>
<td>30</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>- Consulting/Executive positions</td>
<td>40</td>
<td>20</td>
<td>40</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>- Training/counseling</td>
<td>20</td>
<td>50</td>
<td>30</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>- Authoring of books</td>
<td>40</td>
<td>50</td>
<td>30</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>- Research</td>
<td>45</td>
<td>0</td>
<td>55</td>
<td>100</td>
</tr>
<tr>
<td>30</td>
<td>Incentive</td>
<td>30</td>
<td>45</td>
<td>25</td>
<td>100</td>
</tr>
<tr>
<td>40</td>
<td>Interaction</td>
<td>20</td>
<td>50</td>
<td>30</td>
<td>100</td>
</tr>
<tr>
<td>100</td>
<td>Total</td>
<td>30,3</td>
<td>37,6</td>
<td>32,1</td>
<td>100</td>
</tr>
</tbody>
</table>

It can be recommended to make a special face-to-face assessment of the candidates before final selection is made. This assessment could be done by a quantitative assessment technique as shown in Table A.7 later.

An *alternative* way of assessing is to use an assessment method where candidates are asked to respond to assessment criteria set up by the organization/company. It is a portfolio type of assessment that can be very demanding for the candidates as they have to deliver most material in an assessor-adapted form. This procedure can be illustrated by Figure A.2.
Employer wants fulfilling:

- Formal, mandatory criteria
- General criteria
- Specific criteria
- Personality criteria (Attitude, Behavior, and Character)

Candidates’ information of meeting criteria:

- Formal, mandatory criteria
- General criteria
- Specific criteria
- Personality criteria (Attitude, Behavior, and Character)

Selection of candidate

- = Assessors’ role
- = Superior’s role

Figure A.2/Figure 5.3: Assessment model for hiring candidates for a specific job position

The organization/company should first define its criteria (indicators) for candidates to meet. They can be grouped into formal, mandatory, general, specific, and personality criteria. The specific criteria could look as shown in Table A.6.
Table A.6/Table 5.10: Assessment criteria for position as Marketing Professor
Quantitative Recruitment Model II

<table>
<thead>
<tr>
<th></th>
<th>Max points</th>
<th>Detailing the criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal, mandatory requirements:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- PhD in Marketing</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Minimum Docent title</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Actively present at USBE</td>
<td>-</td>
<td>At least one third of every year</td>
</tr>
<tr>
<td>- Spoken and written English</td>
<td>-</td>
<td>At least level 4 on an ascending scale required within a year</td>
</tr>
<tr>
<td>- Formal pedagogic proficiency</td>
<td>-</td>
<td>For instance Högskolaprov or equivalent pedagogic merit required within a year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>General criteria</strong></td>
<td><strong>60</strong></td>
<td></td>
</tr>
<tr>
<td>- Skills in developing and leading</td>
<td>20</td>
<td>Management positions (content and duration)</td>
</tr>
<tr>
<td>research and personnel both within</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and outside the organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Skills in communication of</td>
<td>10</td>
<td>Conferences, seminars, speeches, other</td>
</tr>
<tr>
<td>research both within and outside</td>
<td></td>
<td></td>
</tr>
<tr>
<td>the organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Documented collaboration with</td>
<td>5</td>
<td>Teamwork activities</td>
</tr>
<tr>
<td>other researchers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Previous success in finding</td>
<td>15</td>
<td>Description of funding (date, amount)</td>
</tr>
<tr>
<td>funding for research projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Creating and maintaining and</td>
<td>5</td>
<td>Member of business organizations</td>
</tr>
<tr>
<td>developing networks with the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>corporate world</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Swedish language positive, but not</td>
<td>5</td>
<td>Level of proficiency in Swedish</td>
</tr>
<tr>
<td>required</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Specific criteria</strong></td>
<td><strong>40</strong></td>
<td></td>
</tr>
<tr>
<td>- Pedagogic training relevant for the</td>
<td>15</td>
<td>Courses with number of times run and course hours</td>
</tr>
<tr>
<td>tasks associated with this position</td>
<td></td>
<td>Advising Master’s and PhD students</td>
</tr>
<tr>
<td>(Planning, execution, and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>evaluation of teaching, Advisory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>activities and examination.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Knowledge within the fields of</td>
<td>25</td>
<td>Scientific proficiency (significantly exceeding Docent position)</td>
</tr>
<tr>
<td>consumer behavior, service</td>
<td></td>
<td>Research within the areas</td>
</tr>
<tr>
<td>marketing, relationship marketing,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>business-to-business marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and/or international marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Personality criteria</strong></td>
<td><strong>50</strong></td>
<td></td>
</tr>
<tr>
<td>- Personal suitability*</td>
<td>10</td>
<td>Attitude</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Behavior</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Character</td>
</tr>
<tr>
<td><strong>Total score</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Oxford Dictionary of English 2003:

*Attitude:* A settled way of thinking or feeling about something

*Behavior:* The way in which one acts or conducts oneself, especially towards others

*Character:* The mental and moral qualities distinctive to an individual
Based on a portfolio type of description from candidates, assessors can now allocate points from zero and up to the maximum point that the organization has defined for the specific criterion. The total score for the candidate can be summarized and thereafter prioritized so that the candidate(s) with the highest scores can be chosen. To be more sophisticated in assessing the personalities of the candidates, a more detailed quantitative assessment schema can be used as shown in Table A.7.

Table A.7/Table 5.9: Personality criteria, ABC model (Attitude, Behavior, and Character) for shortlisted candidates

<table>
<thead>
<tr>
<th>Weight</th>
<th>Name: Candidate X</th>
<th>0.25 (Poor)</th>
<th>0.50 (Moderate)</th>
<th>0.75 (Good)</th>
<th>1.00 (Excellent)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Attitude:</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td>7.5</td>
</tr>
<tr>
<td>4</td>
<td>Towards work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Towards product/service of company</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Towards cooperation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Behavior:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14.0</td>
</tr>
<tr>
<td>6</td>
<td>Balanced</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Focus on talking points</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Good manners</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Character:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14.0</td>
</tr>
<tr>
<td>6</td>
<td>Reliable</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Possessing a “wealth of experience”</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Decent appearance</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>3.0</td>
<td>1.5</td>
<td>12.0</td>
<td>19.0</td>
<td>35.5</td>
</tr>
</tbody>
</table>

Note: Oxford Dictionary of English 2003:
Attitude: A settled way of thinking or feeling about something
Behavior: The way in which one acts or conducts oneself, especially towards others
Character: The mental and moral qualities distinctive to an individual
Source: Inspired by Evan-Jones (2008)

In Table A.7 candidates are assessed in face to face events by one or more assessors. This can be made quantitative by multiplying scores times personality weights and summing up. The score can then be put into Table A.6. In this hypothetical example, the score to put into Table A.6 would be 35.5 out of the maximum 50.

The alternative Quantitative Assessment Method II is regarded as most feasible when many applicants are involved, whereas Quantitative Assessment Method I is more feasible when a few shortlisted candidates are selected and/or the assessment criteria are defined in more overall terms.
I skrifserien Studier I företagsekonomi Serie B utges löpande rapporter från den företagsekonomiska forskningsgruppens verksamhet vid Umeå universitet. Hittills föreligger följande skrifter:

1. Bengt Johannisson och Christian Lindström
Företagstorlek och forskningsaktivitet.
Umeå 1970. Pris 30:-

2. Leif Dahlberg och Gustaf Söderström
Närhetsbutik i glesbygd.
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