Module 1: Developing Yourself as an Effective HR or L&D Practitioner

Introduction

This module begins with a look at what is required of HR/L&D Practitioner and how HR/L&D roles are specified. We discuss the HR Profession Map and how we can use it to assess our professional development needs. We then move on to look at how we deliver HR/ L&D services, considering; who are our customers, how well do we meet their needs and what can we do to improve our service delivery.

Learning Outcomes:

Upon completion of this module, you should be able to:

- Explain why developing yourself as an HR/L&D professional is essential
- Identify professional requirements of HR/L&D roles
- Define your customers and their requirements
- Describe key aspects of delivering an effective HR/L&D service
- Explain the concept and process of continuing professional development and produce your own CPD records
- Discuss key factors to consider when selecting activities for your own development

<u>Being an Effective HR/ L&D Practitioner</u>

The HR/L&D profession is a wonderful profession to belong to. As a career it offers constant variety, the satisfaction of seeing the results of your work, recognition in many different forms – and endless opportunities for learning.

Of course, the profession is not without its challenges, frustrations and occasional upsets, but in our experience HR/L&D practitioners love their work.

An effective HR/L&D practitioner knows what is required of them and enjoys building their capability to meet the requirements. Once they have developed a sound base of essential skills and knowledge they continue to seek new learning, experiment with new approaches and keep renewing their abilities as learning and development professionals.

<u>Understanding HR/L&D Roles and Requirements</u>

Organizational Specifications

Most people working for an organisation will have a job description which sets out the essential requirements of their role. This may be supplemented by further information, about the skills, knowledge and experience required or an internal competence framework which details the abilities and behaviours required of different roles within the organisation.

Activities and tasks of HR departments:

Activity	Task	Executive	Advisory	Admin
Recruitment & selection	• Determining methods • Defining requirements • Advertising • Processing applications • Interviewing • Taking part in decisions • Organizing programmes • Offering jobs • Taking up references			
Industrial relations	• Attending meetings • Applying agreements • Acting as a specialist • Advising on law • Participating in procedures			
Direction and policy	• Developing policy • External relations			
Health, safety and welfare	• Counselling • Occupational health • Pensions			
Pay administration	• Instructions to pay • Initiating transactions • Dealing with complaints			
Manpower - planning and control	• Maintaining records • Controlling numbers			
Learning and development	• Identifying needs • Providing learning			
Employee communication	• Planning • Operating			
Organisation design	• Job descriptions			
Information and records	• Determining needs • Providing information			

REFLECTIVE ACTIVITY

Looking at the table above, identify the activities and tasks that take place in your HR department. Now identify the types of action that your department takes, placing a tick in the appropriate column(s).

Circle those actions that you might take yourself.

Discuss the results with others in a similar position in different organisations.

How do the activities of your department differ from theirs?

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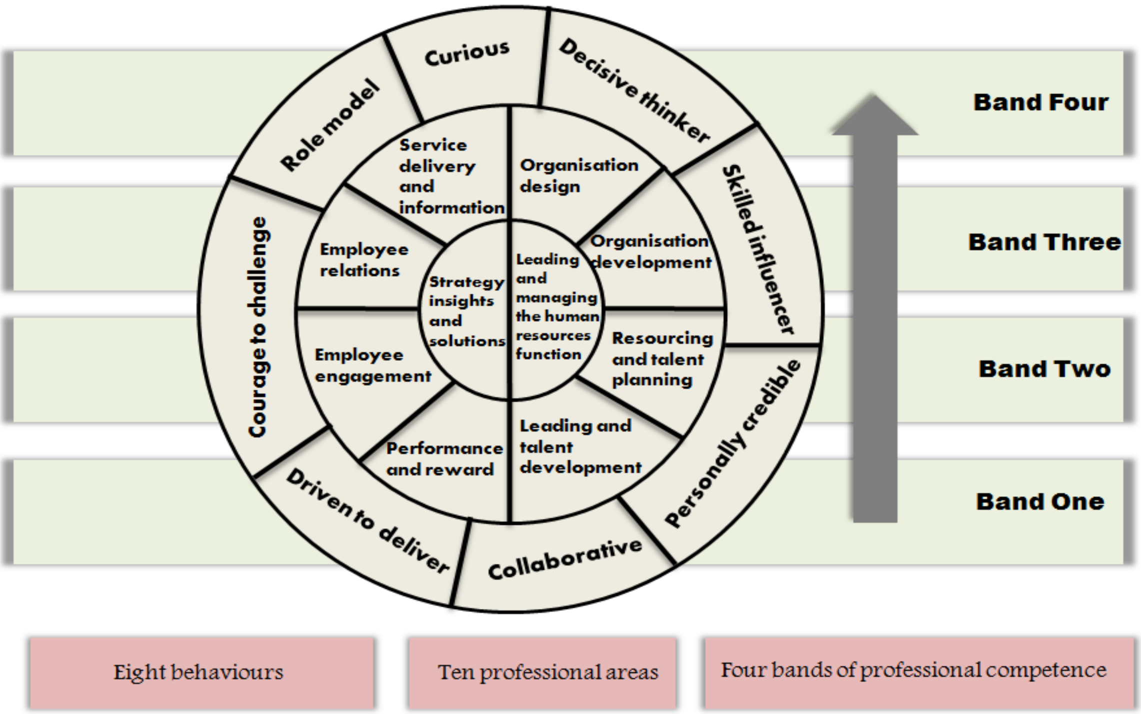
The 10 professional areas.

Of the 10 areas of HR activity, the first two, as listed here, are considered 'key areas' because they extend across all the other eight.

The 10 are:-

- Strategy insights and solutions
- Leading and managing the human resources function
- Organisation design
- Organisation development
- Resourcing and talent planning
- Learning and talent development
- Performance and reward
- Employee engagement
- Employee relations
- Service delivery and information



The above HR Map self-assessment tool helps to clarify the requirements of your role, assess your capabilities against requirements and plan your career progression and professional development.

Each area has an extended definition to clarify the key requirements of people who work in that area.

For Example:

Requirement of 'learning and talent development' professionals is defined as:

Ensuring that people at all levels of the organisation possess and develop the skills, knowledge and experiences to fulfil the short- and long-term ambitions of the organisation and that they are motivated to learn, grow and perform.

The four bands

Each of the 10 professional areas is further divided into four bands, defining the different levels of work activities and responsibility within the area. Below is an extract from the learning and talent development pages.

The eight behaviours

The behaviours describe how work activities should be carried out. The behaviours are:

- Decisive thinker
- Skilled influencer
- Personally credible
- Collaborative
- Driven to deliver
- Courage to challenge
- Role model
- Curious

Different combinations of the eight behaviours link to each professional area.

For Example:

The behaviours deemed essential for people working within Learning and Talent development (at band 2) are:

- **Driven to deliver**
- **Personally credible**
- **Curious**

REFLECTIVE ACTIVITY

If you are an HR or L&D practitioner, prepare a 30-word statement describing the purpose of your job. Ask yourself:

- Why do I have a job?
- What would happen if the tasks I do were not completed?
- How might my contribution be measured?

Band 1	Band 2	Band 3	Band 4
What you need to do (activities)			
6. Implements systems and processes that measure the efficiency of third-party suppliers, and the expected return of the learning and training interventions.	6. Works with third-party providers to monitor service levels and give timely feedback. Uses the relationship with third parties to gain new insights on the external marketplace. Develops processes that measure the expected return of the learning and talent development interventions.	6. Manages third-party learning and talent development suppliers against agreed standards, contracts or service-level agreements.	6. Negotiates and manages major third-party contracts for the delivery of learning and training services, establishing reasonable costs and high standards of execution. Sets and manages appropriate metrics to track delivery.
7. Processes and captures data from learning and talent development events to support the evaluation of initiatives in the immediate and longer term.	7. Develops, pilots and evaluates learning and talent development initiatives for effectiveness, business relevance and cost. Ensures measures are relevant and understood by managers.	7. Develops, pilots and evaluates learning and talent development initiatives for effectiveness, business relevance and cost. Ensures measures are relevant and understood by managers.	7. Creates and leads the business case for learning and training including costs vs benefits considerations. Designs metrics that track the business benefit and is able to demonstrate expected return and value created.
8. Supports instructional design experts in the development of programmes, and researches and analyses the cost of the most appropriate delivery channels.	8. Works with subject matter experts and takes the instructional design lead in the develipment of programmes. Recommends the most appropriate delivery channel	8. Works with the subject matter experts and takes the instructional design lead in the development of major programmes across the organisation. Recommends the most appropriate delivery channel.	8. Takes the lead in the design and delivery of critical learning and talent development interventions.
9. Supports the delivery of learning and training programmes, managing delegate lists, joining instructions and evaluation process.	9. Facilitates internal learning events and workshops, delivering content as appropriate.	9. Facilitates internal learning events and workshops, delivering content as appropriate.	9. Facilitates executive leadership learning events and workshops, delivering content as appropriate.
10. Manages organisation learning management or training records system and highlights retraining requirements in safety-critical skills and areas of compliance.	10. Engages with managers and employees to ensure that the organisation is in compliance at all times with relevant training legislation.	10. Engages with managers and employees to ensure that the organisation is in compliance at all times with relevant training legislation.	10. Establishing systems and processes to ensure that staff are adequately trained and regularly retrained in safety-critical skills and other compliance issues in accordance with local legislation.
11. Informs and advises staff and management on the elements of the development infrastructure and how the whole system is intended to operate.	11. Advises and coaches managers in the optimal use of the development infrastructure, challenging them to agree personal development plans with staff.	11. Leads the detailed design and management of a section of the development infrastructures, eg apprentices, graduates, managers, executives and front-line staff.	11. Leads the designs of a development infrastructure, including career paths/maps,capability frameworks, technical ladders for each technical discipline and contribution level (eg individual contributor, supervisor, manager, leader, executive).

Effective Delivery of the HR/ L&D Service

Whatever your role within HR, you will be involved in providing a service to customers. Being effective as an HR professional means providing a high quality service in terms of delivering your service efficiently and in a way that meets your customer's needs.

The HR map definition of Service Delivery is:

> Ensures that the delivery of service and information to leaders, managers and staff within the organisation is accurate, efficient, timely and cost-effective and that human resources data is managed professionally.

The skills of effective service delivery and how to develop this further will be discussed. Here are some of the things you need to consider.

1. Know your customers and their requirements

> If you're not serving the customer, you'd better be serving someone who is.
>
> Karl Albrecht

However, HR is organized in your organisation, you need to give thought to how you will be judged by your internal customers and more often than not, that judgement will be on the service you are perceived to give to them.

For HR departments (as with other functions and many professions) the question arises: "Who are our customers?" Are the other departments, prospective employees, current employees, senior managers, or all of these? Since the last option is essentially correct, how will we balance conflict between different customers? Who will have priority?

One way of understanding the dilemma this poses is to look at the notion of stakeholders.

In the stakeholder concept, these other parties or customers are seen as having a stake in our department's time. Although balancing conflicting interests may be regarded as a managerial function, we all have to mediate between the various people who make demands on our time at and away from work.

As an example, consider others who have a stake in your personal time: your partner, your family, your source of income, and any voluntary leisure commitments. You need continually to balance the demands of each of these on your time and energy and against each other.

Looking again at the work situation, the stakeholder concept is not restricted to internal departments. The organisation itself needs to consider a whole range of groups that have a stake in its activities. These are likely to include employees, shareholders, trade unions, the government and local communities, as well as customers and suppliers.

REFLECTIVE ACTIVITY

Taking your organisation, or the site within it where you work, identify the main stakeholders.

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Which groups or organisations benefit from the existence of your employer?

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Who would lose out if your organisation became less successful or reduced its presence?

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What implications do these stakeholders have for your work?

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Balancing the differing needs of stakeholders demands good communication, understanding, assertiveness and judgement.

It is a major challenge for all managers.

Communicate, Communicate and Communicate!

Keep your communications with customers effective by thinking of the following factors.

Know your objective

Even the simplest of communications has a purpose. If you are not clear yourself about what you are trying to say, then your communication will also be unclear.

Consider the needs of the recipient

Relevant information will include:

- The types and amount of information they need from you
- Their preferred method of communication and the channels available for them to reply
- How much they already know about the subject – so that you can pitch your communication at the right level and use the right language and technical-speak, for example
- Whether or not they are likely to agree with your communication and how they are likely to react to your message

Choose your medium

This depends on much more than just your personal preferences for communicating. As e-mail might be the easiest for you - but is it the most effective for the objective that you need to achieve? Other communication options might be: face-to-face meetings, conversations, group bulletins, telephone calls, conference calls, presentations, texts and electronics postings.

Whilst e-mails allow people to access information in their own time and provide a written record of a communication, they can be impersonal and open to interpretation. Sometimes a telephone call or face-to-face meeting is more appropriate to clarify and discuss details or address more sensitive matters.

Presentations and formal meetings have their place for formal communications – and can add weight to a message – but can be disruptive and costly in terms of time away from the workplace. Texts are great for informal messages within well established relationships, but may be inappropriate for business communications and communications with certain customer groups. Group bulletins and electronic postings are useful for non-urgent information and for delivering a consistent message to large numbers of people.

The main factor is to choose the best method for the purpose and to make sure that the style of communication is congruent with the message. In face-to-face and spoken communication, for example, make sure that your body language, facial expressions, and tone of voice, all convey the same thing. As well as choosing the right words to use, you have to look and sound like you mean it.

"As someone who is quite 'task focused' I recognized that my emails sometimes came over as a bit stern or unfriendly to recipients who are more 'people focused'. I tend to go straight into the main purpose of the communication, forgetting any of the 'opening words' that make an email friendlier and more engaging for the reader.

Now, I still focus on writing the main purpose of the email first (whilst it is clear in my thoughts), but before I send it I go back to the beginning and think about the recipient a bit more – and maybe add some more personal or sociable opening words. It doesn't take much – just a 'how are you doing' or 'I hope X project is going well' can make the email more balanced and avoid it sounding too stern or impersonal."

Check for receipt and understanding

Good communicators always make sure that their message has been received and understood. In face-to-face communication we can check out the body language and facial expressions of our audience. In telephone communications we can monitor the questions we are asked, or ask questions ourselves to gauge the level of understanding. For important written communications we may ask or responses or compile a list of frequently asked questions.

That true meaning of a message is what is received, rather than what is sent.

If you are interested in developing your relationship building or communication skills- you might find topics such as Emotional Intelligence, Assertive Behaviour, Non-violent Communication or some aspects of Neuro-Linguistic Programming (NLP) of interest.

An example NLP approach aimed at enhancing communication skills concerns 'thinking styles'. Three pairs of thinking styles are identified as 'away from and towards', 'global and detail' and 'procedures and options.'

Away-from thinkers are motivated to take action when it will get them away from the things that they do not want. Your message should refer to penalties, current problems and potential dangers.	Towards thinkers are motivated to take action when it will move them towards things that they do want. Your message should refer to rewards, solutions and achievements.
Global thinkers understand things when they can see the bigger picture. Your message should include overall concepts and link to bigger themes and messages.	Detail thinkers understand things when they know the ins-and outs of the details. Your message should include practical examples and referenced detail.
Procedures thinkers like to follow instructions and processes. Your message should include step by step procedures and protocols to follow.	Options thinkers like to make their own decisions. Your message should include the choices that are available and the level of individual empowerment that people have.

If you recognize any of these thinking styles in your customers or colleagues, you could try adjusting your message to fit their style – and see if this adds to the quality of your communications with them.

2. Establish Positive Working Relationships

Building good working relationships with your customers will help you and them get what they need from the relationship and manage things more easily when there are problems or difficulties. Some good relationships will happen by accident, through natural rapport, but others may need working on. Some steps in building a good working relationship are:

Make an active effort to build the relationship

Decide which relationships are important and commit to actively working on them. You can build rapport through taking a genuine interest in the other person, and finding out a little about their situation, their motivations, their likes and dislikes. Let them know a little about you too – it is a two-way relationship.

Take time to understand customer needs and preferences

Listen to them and establish what is important to them. Keep clarifying what they need from you and from your function. Ask them to tell you if you do something that they are unhappy with, before it becomes a big issue.

Set clear and realistic expectations of what you can provide

Be clear about what you can and cannot provide. It may be tempting to agree to more than you can deliver, but this will only cause trouble later. Ultimately you will gain much more professional respect by being honest about what can and cannot be achieved and setting realistic expectations.

There may be guidance already in the organization to inform how you can deliver your service to customers. Your organization may have a customer service policy or service standards for external customers which could inform how you serve internal customers. Or you establish service level agreements or service contracts with customers. Perhaps your performance objectives specify the standards of service you are required to provide. Having clear guidelines for your work will help you make quicker decisions about what you can and cannot provide and help you to set realistic expectations with customers.

REFLECTIVE ACTIVITY

What guidance is available to you about *how* you deliver your service?

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Is it helpful – could it be improved or made more useful?

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What would be required to make it more useful?

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3. Deliver the Service

Meet expectations

Having agreed what you will provide – provide it as agreed. The best way to maintain good relationships with your customers is to consistently provide the service they are expecting from you. This builds up customer's confidence in you and is the basis of all working relationships.

Keep customers well informed

Let customers know what you are going to do, what you have done, what is still to do, when it will be done, etc. Keeping customers informed will prevent them becoming concerned that things are not going to plan. Information is important when things are going well but even more important when there are difficulties. If ever you cannot fulfil requirements, maintain trust by telling customers about the potential problems as soon as possible, explaining why problems have arisen and offering the best solutions you can.

Manage your time and workload

Getting everything done on time can be difficult and we often have to prioritise our work, according to key work objectives and project timelines. A useful tool to help us think about our work priorities is the Time Management Matrix, which was popularized by Dr Stephen Covey, in the Seven Habits of Highly Effective People (1992).

To use the matrix, you first need to classify your tasks in terms of how important they are and how urgent they are:

- An important task is one that helps you achieve your main objectives, or moves you forward in an important direction. It is probably something you want to spend time on and do particularly well.
- An urgent task is one that has to be done to meet a deadline. The nearer you get to the deadline, the more urgent the job becomes.

You can then 'plot' tasks on the two scales of the matrix – and so identify four quadrants or categories of tasks. How you approach your different tasks can then be guided by which quadrant they sit in.

	Urgent	Not Urgent
Important	**Quadrant 1** **Important and urgent**	**Quadrant 2** **Important but not urgent**
Not Important	**Quadrant 3** **Urgent but not important**	**Quadrant 4** **Not important and not urgent**

Time management matrix

Quadrant 1: Important and urgent

These are your top priorities and should be done first. However, you should try to avoid tasks moving into this quadrant by planning important work ahead.

Quadrant 2: Important but not urgent

You should start working on these as soon as you can. Plan in advance how you will address them and start 'chipping away' at them whenever you have some time. Because they are important, they should not be left to the last minute, when you may have to compromise your standards. Try to keep making small contributions to these tasks before the deadline so that you avoid the pressure and compromises of them becoming urgent.

Quadrant 3: Urgent but not important

You will have to do these tasks quickly because there is a deadline, but do not spend too much time on them. Get them out of your way quickly or if possible delegate them to someone who is capable and that you can trust.

Quadrant 4: Neither important not urgent

There are three ways to deal with these:

1. Do not do them at all if they are a waste of time
2. Delegate them
3. Forget about them until they are nearer to the deadline

If you are managing your workload well, the majority of your time will be spent on Quadrant 2 activities. If your time is taken up with Quadrant 1 activities then you are constantly fire-fighting and probably not achieving a great quality of work. If you are spending your time on Quadrant 3 and 4 tasks, then you may be neglecting important work for tasks that you find easier or more immediately interesting. It is probably a good time to review and re-consider your priorities.

> "Providing a service to your clients should not make you a servant to their every wish. It's about valuing and respecting the people expertise you bring and working in equal partnership to meet the organisation's needs."
>
> *Steven Cartwright, Customer Service Consultant, With a V Ltd*

Balance conflicting customer needs

Sometimes the different needs of customer groups can conflict. For example learners may want extra time to complete their learning, but managers want to minimize time away from the workplace, or staff may want to undertake a qualification but the organisation has decided not to sponsor the type of qualification the staff member is seeking, or your learners would like you to be in one place supporting them, whilst your manager needs you to be somewhere else covering a different activity.

Ideally, there will be an underpinning policy or procedure to help you deal with such situations – for example a Learning and Development Policy covering sponsorship of staff qualifications or specifying staff's entitlement to training and development – and there is not then this is an area you could usefully help develop.

If there is no obvious guidance, then grade or levels of power in the organisation may come into play with managers being able to make the final decisions. However, often there is a way of meeting both needs to some extent – and offering something to either party, whilst explaining why you cannot fully meet either's needs is often the best way forward.

In the examples above, you may be able to negotiate a compromise between managers and staff on the actual time spent away from the workplace for learning, or you may be able to refer the person wanting to study a qualification not sponsored internally to other funding sources, and also link them to a mentor in the organisation who could support them with their qualification.

However much we try to meet our customers' needs there will be times when we have to explain that a need or request cannot be met. As long as we do this professionally and sensitively it may be our best solution. Knowing when to bring a situation to a close and move on to other things is an essential aspect of managing our time to best meet the needs of all our customers.

Address problems, complaints and difficulties

> "In the middle of difficulty lies opportunity."
>
> *Albert Einstein*

If you have already taken time to: establish customers' needs, build a positive working relationship with them and communicate regularly and effectively, you will have done much to avoid problems arising.

However, things do go wrong sometimes and have to be addressed – they rarely 'just go away'. Before attempting to resolve a problem it is important to be sure that it is your place to solve it – consider whether an issue should be referred to someone else, for example, or be escalated up the management line.

The classic approach to problem solving is to:

- Clarify the problem – taking into account the views of different parties
- Identify the options for solving the problem
- Establish the relative advantages and disadvantages of the various options
- Agree the preferred option with those involved and implement the option

At such times it is very helpful to have organizational policies and procedures, or even legislation, to refer to. We have policies and procedures so that everyone knows what is expected or accepted in certain circumstances and these are an obvious source of help in clarifying problems and identifying solutions. Service level agreements are also very useful as they remove the subjectivity from an issue – either an agreement was met or not.

Remember that you do not have to come up with a solution yourself. Problem solving is about finding solution options, from talking to others and reviewing relevant documentation, and establishing the best solution from the options available.

The way you handle problems and complaints will have a big impact on the outcome. If you can stay calm, avoid becoming defensive and focus on finding the best solution to the problem, you will get a much better response than if you argue, speak aggressively or behave unprofessionally yourself.

> "If you find dealing with customer problems difficult or you have a tendency to overpromise, you might find an Assertive Behaviour workshop useful. Assertiveness is not being 'bossy' but is about finding a balance between your needs and the needs of the people you are working with, and expressing this clearly and confidently."

Keep reviewing the service

Hopefully problems will only form a very small part of your relationship with your customers but, do not wait for feedback – or complaints – take the initiative and keep checking if customers are getting the service they need. Keep reviewing, keep evaluating and keep making use of the information collected to develop and improve the service.

Exceeding customer expectations

If we can find ways to exceed expectations we can give our customers an even better experience, whilst demonstrating our commitment to providing a great service.

Here are some wide-ranging examples of great customer service in a learning and development context:

- Staying late to help someone finish a project in time for their deadline
- Preparing a pack of material and a promise of a one-to-one coaching session for someone who was unable to attend a training event
- Following up an enquiry from a learner, even though it is officially outside your remit
- Adapting training events to meet learners needs – on the day – if the intended content is not the most suitable
- Basing your advice about learning purely on what is best for the learner – even if that means promoting someone else's service rather than your own
- Providing silly prizes within a training course to make it a bit more fun – especially if it is a tough subject or session
- Being courageous in telling someone when you think that what they are doing is not in their best interests of their team
- Recognising when learners or managers are under pressure and doing something, beyond your remit, to help without being asked
- Sending out a quick and timely summary of agreements made in a meeting or of some notes you made which would be helpful to others
- Providing electronic copies of handouts and important flip-chart pages immediately after the event
- Providing something a little bit special with the refreshments during a training session – it is amazing how much goodwill can be generated by providing a cake for afternoon break!

REFLECTIVE ACTIVITY

What great service have you received – in any aspect of life?

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Can you transfer any of these ideas to your own service delivery?

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Managing Your Own Development

> "Learning is ongoing – you can learn from every interaction – it is one of the true joys in life and is free."
>
> *Terry Hart, HR Director*

Continuing Professional Development

Continuing Professional Development (CPD) is the action we take to maintain, update and grow knowledge and skills required for our professional role. As the name suggests, it is an ongoing commitment, lasting for as long as we remain within our profession.

As L&D professionals, our knowledge is our product. If we are not knowledgeable in our subject areas or we do not know how to support and facilitate learning, then how can we help others or contribute to our organisations? CPD is an essential investment in our career and doubly important to us if we are to role model the commitment to learning and development we expect from others. Undertaking CPD and keeping an appropriate record of it is a requirement of membership of the CIPD and of most other professional bodies.

There are many reasons why we are motivated to learn new things. The fact that we are in this profession suggests that we are already enthusiastic learners. CPD requires us to focus a part of our learning specifically on areas that are related to our profession – but L&D is a very wide field, and there are very few things we can learn that do not contribute in some way to our abilities to help other people with their learning.

REFLECTIVE ACTIVITY

What motivates you to learn?

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What was the last learning activity you undertook?

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How did this contribute to your abilities as an HR practitioner?

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The benefits of developing ourselves are boundless – not just for us but also for our learners, the organisations we work in or with, and the HR/ L&D team or function we are a part of. Some of the potential benefits are shown in the following table.

Benefits for you:
-Enhance reputation and job satisfaction
-Increased confidence and self esteem
-Improved career prospects and employability
-Improved professional status
-Development is a transferable skill

Benefits for your learners:
-Better quality training
-Up-to-date advice and information
-Training that employs new approaches and methods
-Training that better meets needs
-Greater confidence in the training provided for your organisation

Benefits to your L&D function:
-Enhanced reputation
-More likely to be seen as credible and reliable and to become a trusted partner in the business
-More influence with key stakeholders
-A more exciting learning environment and opportunities to learn from each other

Benefits to the organisation:
-Staff who can do the job
-More likely to achieve evolving organisational goals
-Managers can be confident that staff skill levels are compliant and up-to-date with requirements
-Improved employee engagement
-Enhanced external reputation

Potential benefits of CPD

Undertaking continuing professional development is not just about setting personal development objectives and fulfilling these, it is also about reflecting on our learning and applying it to our working life. We should also record our learning activities and reflections to capture our progression as learners and also to demonstrate our commitment to CPD to other parties.

The concept of CPD reflects both the Training cycle and the Learning cycle. It follows the Training cycle in that we need to identify our learning needs, find learning to meet these needs, access the learning and then evaluate how well our learning needs have been met – and then start again with the next learning need.

CPD also follows the Learning Cycle in that it requires us to reflect on our experiences, find new ideas and ways of doing things, and experiment with our new ideas – and then start again reflecting on our new experience.

Key features of CPD:

1 CPD includes an element of planning and an element of recording and reflecting. You may already have a 'development plan' at work or you want to devise your own.

2 Planning your CPD is important to ensure that you take a strategic approach to your professional development and include everything needed to meet your professional requirements. You might link your development plan to a performance review cycle at work, or it might be something you do on an annual, or more frequent, basis.

3 You will need to set SMART objectives for your development so that you can measure your progress towards, and eventual achievement of, your objectives.

4 You should review your progress towards objectives regularly and ensure you stay 'on track' – particularly for learning objectives that are compliance or qualification related.

5 As well as planning your CPD you should also record and reflect on your CPD and consider how you will make use of your learning. If you can get into the habit of recording your reflections as you go along it will be easier and more useful to you.

6 The way you record your CPD reflections is up to you.

7 There are likely to be learning activities and learning experiences that you have not planned but which are relevant to your overall development and that you want to include in your CPD record.

8 You may need to make your CPD record available to other parties occasionally – but it is usually acceptable to provide a reduced or summary version if you are uncomfortable about revealing the full document.

Specific - clear about what to achieve

Measurable - how will you know that you have achieved

Achievable - realistic objectives and take achievable steps

Relevant - objectives that take you to larger career and personal aspirations

Time-bound – achievable end-date

Below are some sample formats of CPD plans.

Example 1:

What I want to achieve	How I will achieve it	Info/resources required	Review date	Outcome

Example 2:

Objective	Action required	Outcome

Example 3: CPD reflective record format

Key dates	What I did	Why	What I learned	How I'll use it

Example 4: CPD reflective record format

Date	Event/Experience/Activity	Reflections on learning & how I will use it

Table below is an example of an L&D practitioner CPD record. The first column is used to link activities to the learner's Personal Development (PDP).

PDP	Experience/Activity	Reflections on learning and how I will use it
4	Attended second 'Certificate in Learning and Development Practice' workshop	Got an overview of the full L&D role and realized it is wider than I had thought. Made me aware of some of the areas I still have to learn. I recognized that I need further development in undertaking a learning needs analysis and designing training. Feel more confident about delivery and evaluation. I also need to think more about our organizational objectives – and would like to develop my coaching skills further. We did some self-assessments and I scored highly in communication skills, and supporting other people's learning. This makes me feel more confident about my abilities. I realised that I do contribute to the organisation in lots of ways – but don't always make these explicit – or even recognise it myself sometimes.
	Team meeting (May 5th)	We began the process of setting team objectives for next year. We did a review of what we need to do more of, what we need to change, and what we need to stop doing. I ran a session on our organisational goals and how these cascaded down into what our team has to achieve. Everyone said this was really useful and helped them see now they fit in to the big picture. Preparing for this session has made me so much more aware of my role and my contribution to the organisation – and I can use it towards my qualification.
	Read '59 Seconds' by Richard Wiseman	Really enjoyed this – and loads of learning in it. Particularly liked the ideas about how to be persuasive – and how to be more creative (will try out the group dynamics idea and the upside down arrow picture) and the general philosophy that so much can be achieved in such a short time or in small ways.
3	Completed A1 portfolio & had professional discussion	The final 'piece' of my assessment was a professional discussion with my assessor, which went well. There are just a couple of 'loose ends' to tie up and then I will have finished. I should have completed this sooner – I can assess now without having things countersigned all the time and be more decisive when I give J or L feedback on their work. I will be able to use my learning from the A1 in other types of assessment too. I now have a clearer idea of different assessment methods and how to plan for and implement them. I also feel more confident about how I give feedback having been observed doing this and discussed my approach with …

Choosing Self-development Activities

There will be a number of practical factors impacting on your choice of development activity, including:

- Costs
- Availability
- Time scales

Beyond these factors it is good to get a balance of learning across:

Maintenance and development needs

What you need to keep refreshed and up-to-date against what will be new areas of learning for you.

Specialist subjects and training skills/knowledge

If you train in a particular subject area you will need to maintain your technical abilities and knowledge, as well as developing your skills and knowledge as a trainer.

Performance requirements and personal aspirations

As well as the learning you have to undertake for your job and professional requirements, you may also have personal aspirations or long terms plan you want to prepare for.

Different learning methods

Even if you have a preferred learning style it is important to involve yourself in a range of different approaches. Challenge your preferences sometimes – maybe opting for a highly participative learning activity, even though you would normally choose to learn through researching or reading – and develop your other styles in doing so.

Left brain and right brain

If work-related development needs are very logic-based and left-brained you could balance this by undertaking some more right-brained ‘creative and artistic’ development activities.

Established content and leading edge

Whilst there is a vast amount of current and established learning content essential to our professional development, being aware of some leading-edge developments can greatly enhance career prospects. New ideas relating to learning are emerging from all kinds of fields including neuroscience (how the brain works), psychology models of learning communities and ongoing developments in virtual learning environments).

Serious and fun

Sometimes it does us good to do some light-hearted development that may appear to have little professional connection but could just 'light a spark' of a future learning direction or at least be a good stress reliever.

As an L&D practitioner you will be aware of the many types of learning activity available and there are further descriptions and discussions in the following modules.

Some methods to consider for your development may include:

- Attending a training event
- Attending a conference or exhibition
- Reading books, articles or blogs
- Job shadowing
- Academic learning
- IT enabled learning
- Reflecting on work events
- Being coached
- Having a mentor
- Taking part in a project
- Action learning sets
- Attending networking events

Before undertaking any of these activities, ask yourself 'what is my objective for doing this, what do I want to learn?' Having completed the activity, ask yourself 'What did I learn and how will I use it?'

Finally, remember that undertaking your CPD is itself a development activity. Writing down your goals and planning how you will address them will give you a much greater chance of achieving them. Recording and reflecting on your development activities will consolidate and enhance the learning you get from them. Your CPD Record is a symbol of your commitment to your own learning and something you can be very proud of.

NOTES: