The Relationship between Individual and Organizational Learning: New Evidence from Managerial Learning Practices
Elena P. Antonacopoulou

Management Learning 2006; 37; 455
DOI: 10.1177/1350507606070220

The online version of this article can be found at:
http://mlq.sagepub.com/cgi/content/abstract/37/4/455

Published by:
SAGE Publications
http://www.sagepublications.com

Additional services and information for Management Learning can be found at:

Email Alerts: http://mlq.sagepub.com/cgi/alerts

Subscriptions: http://mlq.sagepub.com/subscriptions

Reprints: http://www.sagepub.com/journalsReprints.nav

Permissions: http://www.sagepub.com/journalsPermissions.nav

Citations (this article cites 22 articles hosted on the SAGE Journals Online and HighWire Press platforms):
http://mlq.sagepub.com/cgi/content/refs/37/4/455
The Relationship between Individual and Organizational Learning: New Evidence from Managerial Learning Practices

Abstract  The relationship between individual and organizational learning remains one of the contested issues in organizational learning debates. This article provides new evidence about the relationship between individual and organizational learning and presents empirical findings exploring the learning practices of individual managers. The discussion reveals the psychosocial dimensions of learning as a process that transcends across multiple levels and units of analysis. The analysis of the relationship between individual and organizational learning highlights the multiple and interlocking contexts that define the content and process of learning in organizations, the politics of learning at work and the institutional identity of individuals’ learning as a reflection of organizational learning (or lack of it). The article concludes with a review of the implications of the findings for future research on learning in organizations and the way we study the relationship between individual and organizational learning. Key Words: banking; managerial learning; organizational learning

Introduction

The relationship between individual and organizational learning remains one of the unresolved issues in current organizational learning debates. Several contributions have sensitized us to the interdependencies, differences, possibilities and challenges involved in aligning individual and organizational learning agendas (Antonacopoulou, 1998; Friedlander, 1983; Friedman, 2001; Kim, 1993; Richter, 1998). The paradoxical nature of learning in organizations has been captured by Argyris and Schön (1978: 9)1 and is reflected in one of the most fundamental questions in organizational learning research—‘Does an organization learn?’
Currently, a range of responses to this question have been noted in the literature, which can be grouped under the headings of ‘yes’, ‘no’ and ‘maybe’.

The bulk of the contributions in the field seem to agree that it is not possible to talk about organizational learning because this would be a reification, which would give organizations anthropomorphic qualities (Kim, 1993). Therefore, it is now commonly agreed that organizational learning is the product of individuals’ learning (Argyris and Schön, 1978; Fiol and Lyles, 1985; Senge, 1990). However, recent thinking based on the same proposition, has shifted the focus on the collective practices of people within organizations, thus locating learning at the community group level taking into account the subcultures and related actions within the specific community structure (Brown and Duguid, 1991; Crossan et al., 1995; Lave and Wenger, 1991).

There are of course those who argue that it is possible to talk about organizational learning given that organizations exhibit some learning abilities such as: competence acquisition, experimentation, boundary spanning and continuous improvement (DeGeus, 1997; DiBella and Nevis, 1998; Rheem, 1995).

It is more interesting to note, however, the arguments of those who could be located in the ‘maybe’ camp. They tend to argue that organizations develop and accumulate knowledge in files, rules, roles, routines, procedures and through their culture and structure they develop shared mental models, values and behaviours, which constitute part of the organizational memory (Cohen and Bacdayan, 1994; Schulz, 2001; Walsh and Ungson, 1991; Weick and Roberts, 1993). Therefore, organizational learning from this perspective could exist when we consider that organizations do not have brains, but have cognitive systems and memories, which allow them to make sense of the changes in their environment. Organizational learning therefore is presented as a social process, which is affected by the contextual factors such as the organization structure, information, communication and control processes, which impact on the way individuals learn (Hedberg, 1981; Pawlowski, 2001; Simon, 1991).

Essentially, different theories of organizational learning appear to address different levels and dimensions of learning. The organizational learning debate seems to have stalled, partly because we are missing ways of capturing the holistic and complex nature of learning in organizations in ways that we can engage in at the same time, both the relationships across levels of analysis and the multiple dimensions of learning (Antonacopoulou, 2006).

This article responds to this need and provides a first step in this direction by exploring the interconnectivity between different levels of learning, thus revisiting the relationship between individual and organizational learning. The analysis focuses on managerial learning practices as a means of unveiling the different dimensions that underpin the connections between levels. In other words, the objective is to expose the conditions that shape what learning is perceived to be, how it is pursued and for what ends. By posing such questions and by focusing on individual learning practices in organizations, it is expected that further socio-political subtleties underpinning the relationship between individual and organizational learning will be revealed. Figure 1 represents diagrammatically the initial conceptualization of the interdependencies between levels and dimensions in capturing the richness of learning as a complex social process.
Undoubtedly, the specific context in which the relationship between individual and organizational learning is examined, is bound to generate insights. This article reports findings from a study of managerial learning practices in the financial services sector in the UK and comparatively across three retail banks.

The discussion begins with an overview of the main contextual characteristics of learning at the national and sector level in the banking sector in the UK. The similarities and differences in the organizational context for learning in the three retail banks will also be presented as a backdrop for presenting subsequently the findings on managers’ learning practices. The presentation and analysis of the research findings will show how the core learning principles at the industry and organizational level have created conditions that shape the way individual managers perceive learning, the approach they adopt in order to learn and what they actually choose to learn. The analysis unpacks the psychosocial nature of learning and explores the political forces that shape learning practices in organizations. These insights provide an important platform for rethinking the nature of learning in organizations and the relationship between individual and organizational learning discussed in the last section of the article.
The Financial Services Sector in the UK: Managerial Learning in Three Retail Banks

Banks do not only influence the economic, political and socio-cultural context in which they operate; they are also affected by it. Economic, political and socio-cultural factors have been significant forces for change in the retail banking sector in the UK in recent years. Moreover, the trends in the world economy have forced retail banks to be more international and global in outlook. Furthermore, the changing structure of the industry at large is a trigger to many of the internal changes identified within the sector. The various internal and external changes are fundamentally transforming the role that staff are expected to play within banks. Banks realize that it is necessary to develop policies that will ensure that once skilled people are in position, they are retained and grown to meet the future needs of the business. As a result, banks find themselves with an expanding mix of interrelated human resource management (HRM) problems to manage (Storey, 1995). Among these issues, management education, training and development have been a critical priority.

Management Education, Training and Development in Banks

Banks have a reputation for providing most of the specialized training skills required in the sector, which gives banking a remarkable degree of loyalty and esprit de corps (Jones, 1991). Traditionally, banks recruited school-leavers, who were trained through a formal disciplined classroom approach and had to pass professional qualifications (such as the Association of the Chartered Institute of Banking Diploma—ACIBD) in order to meet the immediate needs of the bank. Despite the commitment of UK banks to training their staff, they have been criticized for not spending sufficiently on training and development (Bournois and Torchy, 1992; Murphy, 1989). Investment in training has taken a new turn as regulatory measures by the Financial Services Authority (FSA) have come into force, requiring banks to provide evidence of regular training, as well as the impact of such training on staff development. As Mackintosh (2001: iii) notes, financial institutions now have to provide evidence that staff who undertook training ‘understood what they were doing’.

While the major banks have always been considerable trainers of their junior staff, managers have often been left largely to themselves to find their own approaches to managing. The banks have relied on the professional bodies to oversee the basic professional education of their future management. However, the skill requirements are widening and the core of professional knowledge traditionally taught, becomes less and less relevant and sufficient to sustain the performance and provide the leadership demanded.

The developments in the sector over the last 15 years have shifted the emphasis from technical skills training towards management skills training with particular emphasis on sales and marketing (Donnelly et al., 1988; Howcroft, 1989; Morgan and Sturdy, 2000). While formal training is intended to match the individual’s speed of learning and assist them in their promotion ladder, informal on-the-job training is also encouraged as a means of acquiring the basic banking skills.
The characteristics of the human resource development (HRD) mentality in the banking sector reflect to some extent wider issues about the short-term focus and the limited investment in human capital, which some researchers have identified to be common in the wider UK industry (Constable and McCormick, 1987; Keep and Mayhew, 1996; Mangham and Silver, 1986). Despite the hype of HRM activity in organizations and the efforts by successive governments to change attitudes towards education, training and development remains a cost rather than an investment (Ashton and Felstead, 1995; Keep, 1989). It is significant to note that the wider socio-cultural context at the organizational, industry and country level has, according to recent studies (Antonacopoulou, 2000a; Maguire et al., 1993; Rigg, 1989; Taylor and Spencer, 1994), a determining role in the attitudes managers develop towards learning, education and development.

The education, training and development trends of the financial services sector in the UK provide an interesting context in which to study the nature of individuals’ learning, partly because it reflects quite clearly the impact of social, cultural, political and economic factors at the industry and wider societal level on organizational learning practices.

As a result of the changes in the financial services sector the three banks in this study (Bank A, Bank B and Bank C) have been undergoing numerous operational and strategic changes over the last few years. One of the most significant changes has been the shift to a sales mentality. This shift has caused a reconsideration of their HRM strategy, which included a redefinition of the banks’ training policies, the introduction of new training programmes and, in particular, an emphasis on a more active involvement by staff in their development. A common strategy promoted by all three banks has been a greater focus on learner-centred strategies for the development of staff. Self-development in particular, is seen by the three banks as an appropriate strategy for developing staff in light of the present uncertainties, because it allows the necessary flexibility and self-direction in the development process and facilitates a more immediate response to the changing needs of individuals and the organization (Antonacopoulou, 1999, 2000b, 2001).

Each of the banks in the study have addressed this issue in a different way. In bank A the introduction of self-development in the bank’s vocabulary has been relatively recent by comparison to the other banks and is seen as being a less costly and more efficient approach to management training and development, given that it operates on a do-it-yourself (DIY) basis.

In bank B, the interest in introducing self-development is a concern with changing individual attitudes towards training and learning. The transition towards more self-directed learning approaches is recognized by the bank as a cultural change, because managers are not used to taking such a responsibility. Mechanisms that aim to assist this transition are the introduction of personal development plans (PDPs) and specialist development programmes designed to cultivate responsibility for self-development at all levels.

Finally, in bank C the emphasis on self-development has been part of the organization’s management education philosophy since 1980 and has been gradually enhanced by the new initiatives and the practical indications by this bank of the importance attached to self-development. Bank C has sought to remove any relationship of training to assessment and has invested in flexible learning.
resources (e.g. an internal library of learning materials available to all staff free of charge) to demonstrate its commitment to staff learning and self-development.

The approach of each of the three banks to management learning, as well as the wider industry specific characteristics regarding education and qualification shapes managers’ perceptions and orientation to learning and show the underlying forces guiding their learning practices in these organizations. Before presenting the research findings, a brief overview of the methodological considerations in this research is provided.

Researching Managerial Learning Practices: Methodological Issues

Any approach that seeks to study learning is confronted with a number of methodological challenges, not least of which is how to identify learning when you see it. Considering that learning is as much conscious as it is unconscious, there would be a number of epistemological and ontological challenges to overcome. In the context of this analysis, learning is defined as the liberation of knowledge through learning and self-questioning (Antonacopoulou, 2001). This definition of learning acknowledges that in studying the nature of individuals’ learning in the context of organizations it is important to provide opportunities for managers to articulate what is essentially introspective and retrospective, as well as to reflect upon and question their practices. This process is not only intended to demonstrate potential consistencies or inconsistencies between managers’ ‘espoused theories’ and ‘theories-in-use’ (Argyris and Schöon, 1978), but is also intended to show how managers attribute meaning and importance to organizational issues, including the significance attached to learning and, in turn, how these interpretations are reflected in their praxis. This approach is more geared to interpretativism (Yanow, 2000a); it is sensitive to the social construction of reality (Berger and Lackmann, 1967) and it approaches learning as a phenomenon situated in social practices (Easterby-Smith et al. 1991).

Therefore, the managerial learning practices in the context of the three retail banks are examined by concentrating on the meanings and explanations managers give for their practices in relation to learning. By adopting a comparative case-study approach (Yin, 1994) to locate individuals’ learning practices within each bank and across the three banks in the sector, the analysis of the findings is by definition contextually specific.

A particular strength of the research design in this study is the longitudinal approach, which unfolded in five main phases and took three years to complete. The main strand of the field research was the qualitative interview (semi-structured), while observation, questionnaires and the critical incident technique were supplementary data collection methods employed.

The managerial sample (78) in the three retail banks was randomly selected, incorporating managers across a broad spread of age, seniority, specialization, gender and background. Managers classed as fast-track (who experienced different educational opportunities) were included in the sample and compared with non-fast-track managers.
In the sections that follow, the findings of the study in relation to manager’s views of the nature of learning and how they prefer to learn and what they choose to learn are discussed.

Evidence of Managerial Learning Practices

Managers across the three banks were asked a series of questions about the learning process and in particular their views of what is learning, how people learn, the factors that facilitate or inhibit learning. Managers were also asked to describe a critical incident of a learning experience they considered ‘ideal’ and to explain what was special about it.

The Nature and Approach to Learning Within the Three Banks

The findings provide a very consistent picture across the three banks. It is evident that across the three banks managers have identical views about the learning process. Learning is perceived to result from experience (from everyday life and on-the-job), training, modelling others in the workplace and coaching (i.e. apprenticeship and being looked after). Although managers across the three banks give a slightly different priority to each of these aspects in the learning process, overall they share common assumptions about how people learn. The latter is particularly evident in the strong association between learning and training (for a detailed discussion of this relationship see Antonacopoulou, 1999, 2001). A significant proportion of managers across all three banks (52% in bank A, 54% in bank B and 46% in bank C) refer to specific training interventions, mainly provided within the organization, as their ideal learning experience. The way managers in these organizations define both training and learning, reinforces their interdependence. A common definition of training includes the provision of knowledge and skills, while learning is commonly defined as the process of acquiring knowledge and skills.

The homogeneity (within each bank and across banks) in managers’ perceptions of how people learn, suggests that managers feel insecure about learning if it is not through training, because they have been brought up in an environment that has ‘spoon-fed’ them. As one manager in bank B argued: ‘managers do not feel confident to learn from methods other than formal training courses, because of historical reasons’. This point is echoed in the remarks of training managers as well. A senior HR manager in bank A pointed out that: ‘The average manager waits for the organisation to offer training. At senior levels in particular...The culture of the organisation is paternalistic’. Another training manager in bank B added: ‘Sometimes the culture of the organisation has been that people do as they are told. They attend management courses, because they are told to come.’ A manager in bank B confirms this point, saying: ‘People learn because they are told to. People do not often take the initiative.’ In effect, managers have developed a sense of dependency on the organization and they perceive training as an opportunity for learning because ‘you are forced to learn’ (manager, bank A).

The relatively narrow view of learning, evident in managers’ responses, does not come as a surprise, particularly when one also notes that a common feature across
the three banks is the strong teaching culture that dominates training interventions. The way training is being delivered and the overall atmosphere that dominates training is depicted by managers as a ‘back to school’ experience. It has been observed that training neglects andragogical principles and assumes that managers absorb information without questioning it (Honey and Mumford, 1982; Knowles, 1980). Against this background, managers have come to believe that learning is training and more specifically that learning is going on courses.

The findings of the present study support the observations of Croft (1996), Preston (1993), Thomas and Al-Maskati (1997), and others, that training as a learning event provides the opportunity to find out more about the organization, strategies for surviving in the organization and passing as an adequate employee of the organization by demonstrating acceptable behaviour.

Therefore, training as a source of learning is evidently the result of the banks’ perception of how individuals should develop. These findings provide new evidence about the approach to managerial learning in organizations. While earlier studies (Burgoyne and Stuart, 1976; Davies and Easterby-Smith, 1984) suggest that learning off-the-job (on training courses) are perceived to be less effective, the present study suggests the opposite. Managers in the three banks perceive learning off-the-job as the main source of learning. As the analysis of the findings shows, managers perceive learning through training as the legitimate way to learn, because this is how they interpret what the organization values. Therefore, how managers learn in organizations may well reflect the legitimate route to learning promoted by the organization. This issue also inadvertently reflects a significant degree of power and control on behalf of the organization, which encourages greater dependency by individuals on the organization’s resources in order to learn. This control does not only shape how managers learn, but what they learn as well.

The Content of Managerial Learning

The context and process of learning inadvertently affects the content of learning. The present study examined the content of learning by exploring the choices managers made when they pursued identified learning goals as part of their personal development. It is important to point out that ‘learning goal’ was the term used during the interviews to encourage managers to articulate their learning practices. Identifying and pursuing a learning goal, which they articulate in their own terms, provides a valuable avenue for tapping into the introspective nature of learning. Moreover, studying individuals’ learning goals longitudinally provides an avenue of tracing parts of the learning process as it unfolds, rather than being limited only on retrospective accounts of learning. Both the content and process of learning are constantly redefined as learning goals unfold. It is not uncommon to find that learning goals may be abandoned as a result.

The findings show that by far the majority of managers who were able to identify a learning goal in each bank (69% in bank A, 88% in bank B and 65% in bank C) described as their learning goal, specific skills in relation to their present job. It is fascinating to observe that the common emphasis placed by managers in the three banks on the organization’s priorities and the specific job at hand provided significant consistency and similarity in the learning goals managers identified.
Some of the learning goals managers across the three banks described were the following:

- understand lending, product availability and lending policies;
- improve management skills in delegation, team building and decision making;
- revisit negotiation skills to feel more at home with senior management of other companies, to face aggressiveness and assertiveness with them to create a good interviewing atmosphere;
- refresh basic skills of management, to update current thinking and put it in the banking context;
- develop better time planning and time management.

When asked how they pursued the fulfillment of their learning goal, almost unanimously managers across the three banks referred to training interventions as the ‘obvious’ choice. This observation is especially reflected in the actions described by managers across the three banks as their preferred approach for fulfilling their learning goals. When managers were revisited six to eight months after the initial meeting and were asked to describe the actions they have taken in fulfilling their learning goal, they described activities like: ‘attending a relevant course on the topic’ currently provided by the organization, ‘solicit the help of colleagues’, ‘be coached by the line manager’, ‘talk to people in the bank’, ‘read a book’.

Moreover, it is important to note the similarity in views expressed by managers across the three banks when asked to explain what influenced their choice of activities in pursuing the learning goal. Managers’ responses in terms of frequency suggest the following reasons: first, ‘a matter of preference and a perception of how the learning goal can best be tackled’, second, ‘a matter of opportunities and availability of resources’ and third, ‘ease in accessibility of information’. These findings suggest that managers across the three banks would tend to rely on the organization’s resources and direction in terms of what to learn, as well as how they would go about fulfilling a learning goal. Essentially, manager’s preferred learning approach has evolved over time in line with the contextual definition of how it is best to learn. This also defines introspectively what managers think that they learn when they seek to learn. There is limited evidence of reflective practice in the way managers in the three banks account for what they learn. As far as they are concerned, what they learn is subject to what the organization expects them to know. As long as a learning goal is perceived by the organization to be important, managers would be more inclined to see some value in learning. This is particularly evident in the perceived encouragement by the organization to learn.

Managers across the three banks were asked whether in their view the organization encourages them to learn and to take responsibility for their self-development. The findings suggest that 46 percent of managers in bank A feel they are encouraged to learn, by comparison to 54 percent in bank B and 81 percent in bank C. In relation to the perceived encouragement of the organization for self-development, the findings suggest that 50 percent of managers in bank A feel they are encouraged to take responsibility for self-development, while a larger proportion of managers in bank B (73%) and bank C (100%) perceive they are being encouraged. Comparing managers’ responses, it is evident that managers in bank A are the least encouraged to learn and to develop themselves. These
findings are consistent with the differential strategy adopted in each bank in relation to staff development and learning discussed earlier.

Therefore, in bank A, where the attitude of senior management towards learning has been inconsistent and there have been limited practical indications as to the way learning and self-development may form part of the organization’s HRM strategy, managers do not see as urgently the need to learn. Managers in this organization appear to be less inclined to learn or take responsibility for their self-development, because they remain confused and unclear as to what they need to do and whether the organization would value it. A manager made the following comment in relation to this issue: ‘the rigid structure and senior people determine what should be made available to people. If they have mindsets which consider learning is not important, then no one else does (think it is important)’.

In bank B the encouragement of the organization to learn is acknowledged, but it is often interpreted as an expectation. Despite the emphasis of this organization on learning and self-development and the introduction of systems to support this (such as PDPs), managers do not interpret these initiatives as providing a wider personal choice. It is evident in the case study that the annual appraisal process assesses individuals on their personal development activities and the learning they claim they have undertaken. Therefore, managers in this bank engage in learning and self-development, because the organization expects them to do so, rather than because they personally understand the significance of doing so. A manager’s comments illustrate this point: ‘You are not encouraged; you are expected to develop. You are expected to know things. You do it for your own protection’. Moreover, it is evident that because the message of the bank is inconsistent (as is largely the case in bank A), managers in bank B are not fully committed to learning and self-development, and therefore are more inclined to learn for the sake of fitting in the organizational culture. In effect, this propensity to learning reflects how managers in this bank and in bank A continue to adopt the identity of a ‘bank manager’ enforced by the bank and to mechanically adopt as personal objectives the target against which they are assessed and rewarded, a point which is consistent with previous studies in the sector (Burton, 1994; Morgan and Sturdy, 2000).

Managers in bank C present a more unified understanding of the value of learning and self-development, because they demonstrate more clearly that in pursuing a learning goal they take into account their personal development and their career growth, rather than just the requirements of the bank in relation to their present job. The emphasis on ownership has been a central feature of the bank’s education strategy since the 1980s (when the internal library was first introduced). Moreover, the message of the bank has been consistent and has been gradually enhanced by additional measures such as the introduction of competencies and a more coherent career path for individuals. The latter is a recent initiative, which has been carefully placed in the context of personal development, thus making managers feel empowered. The words of a manager in bank C illustrate the point: ‘The organisation would love you to do something and not tell you what to do.’ Another manager also said: ‘The bank points out the skills you need and provides assistance in getting them. You need to be self-motivated to do it.’

Although managers in this bank would appear to value learning and are more self-reliant, their underlying motives are not significantly different from the motives of managers in the other two banks. They too seek to learn in order to
satisfy the requirements of the bank, which in this case has been more consistent in the message it has been communicating regarding the value of learning and self-development.

In summary, the findings suggest that the extent to which managers would learn would be affected among other things by the perceived encouragement by the organization to do so (i.e. whether learning is a ‘good’ thing), the mechanisms in place to support learning, the historical approach and the tradition in the sector, which determines the acceptable behaviour and the level of freedom there is to learn beyond the boundaries of the education, training and development provided within organizations. Clearly there is something to be said about organizations that encourage individuals to learn and develop themselves, against organizations that are more likely to employ the notion of encouragement as a more sophisticated means of manipulating individuals to achieve the organization’s priorities.

In organizations where the encouragement is genuine, managers are more likely to be more self-reliant and to base their decision to learn on their judgement about the areas they need to develop. Managers in these organizations would tend to pursue learning goals that are personally developmental and which widen their employability. Put differently, learning managers are more likely to seek to learn, because learning is meaningful to them (see Antonacopoulou, 1998). Whereas in organizations where managers learn in order to satisfy the organization’s requirements, these managers essentially do not learn; they merely play by the rules of the political game. The motives of managers in the three banks reported in this article, in relation to learning and self-development, reflect this observation.

The analysis developed in this article and the findings presented illustrate the complexity of managerial learning within changing organizations, the politics underlying the learning process and show the richness of learning as a process, which entails both psychological and sociological dimensions. The psychosocial aspects of learning are very much evident in the motives that underpin learning practices. The need for self-actualization is tightly connected to the need for belonging and doing what is socially acceptable. The need to overcome fears of failure is tightly connected to the socially acceptable definitions of success. Taking stock of these key issues, it is possible to draw out some valuable insights about the relationship between individual and organizational learning.

Rethinking Learning in Organizations: The Relationship Between Individual and Organizational Learning

The analysis in this article has concentrated on individual managers’ learning in three organizations in one sector. The inherent assumption in the organizational learning practices of the three banks is that individual learning will lead to organizational learning. In other words, individuals are expected to act as ‘agents’ for organizational learning (Friedman, 2001). However, when we examine the nature of individuals’ learning it is not hard to see how limited individuals’ learning is, because of the restricted view of learning at the organizational level. Individuals’ learning is significantly affected by organizational practices and managerial learning practices reflect the organization’s orientation towards learning. Managerial learning practices, therefore, are a useful means of understanding
further the factors that influence learning in organizations and the relationship between individual learning on organizational learning. The findings presented in this article show: (1) the multiple and interlocking contexts that define the content and process of learning in organizations, (2) the politics of learning at work, and (3) the institutional identity of individuals' learning as a reflection of the organizational learning or lack of it. These issues are discussed in more detail next.

The Context(s) of Learning

The findings regarding managerial learning in the three banks demonstrate the direct influence of the organization on individuals' perceptions of what learning is, how they should learn, what they should learn and whether learning is meaningful when they do learn. Essentially, there is a strong relationship between individual and organization learning, insofar as individual learning is shaped by the organizational context in which it takes place. However, the findings of the present study suggest that the managerial learning practices are a much more complex product of contextual factors than reference to mere context 2 suggests. The notion of context transcends beyond immediate environment. Context also embraces the wider environmental forces at the national and industry specific levels. These additional levels of context indicate the endogenous and exogenous forces affecting individuals' learning at work.

In the case of the bank managers in this study, their learning is contextually specific in the way they enact their self-image and identity as a bank manager in the context of their current role. They also reflect the learning idiosyncrasies of their employing organization and the wider educational modes common in their industry (banking). Their learning is also a product of the wider social context at the national level that would distinguish British bankers from say Japanese bankers. Evidently, while learning transcends across national, industry, organization, group and individual levels (as presented in Figure 1) it is highly questionable whether the individual influences directly any of these levels of learning. Figure 2 reflects the nature of the learning across levels as evident in the managerial learning practices presented in this article.

Therefore, the findings call for a more careful understanding of the nature of individuals’ learning in organizations in relation to the interlocking contexts in which such practices transcend. The findings also call for greater sensitivity to the power and political agendas as key dimensions, driving learning in organizations.

The Politics of Learning at Work

Considering the impact of the organizational and wider societal context on managers’ learning, it is important to appreciate that learning in organizations does not take place in a vacuum. Learning in organizations appears to be more calculative and structured, reflective of the way individuals seek to address the internal dilemmas they experience when they have to balance personal and organizational priorities in relation to learning. The limited learning choices managers make in the three banks reported in this article are reflective of the learning structures in place, which define the scope of their learning practices.

These findings are reflective of the politics of learning (Antonacopoulou, 2000b, 2001; Coopey, 1995; Lawrence et al., 2005) and highlight only more clearly the
inequalities of power and control, the diversity of perspectives and motives underlying learning, and the tensions between individual and organizational priorities in learning. As evident in the study reported in this article, organizational hegemony is defining the significance of learning and affects individuals’ dependency to learn in culturally acceptable ways (i.e. through training courses provided by the organization).

Given the definition of learning on which this analysis is based, one would question whether what is being referred to here as learning is in fact learning or another form of control. To answer this question one only needs to consider the limited possibility of learning at the individual level, making an impact on learning at the organizational level. As the examples of the three banks show, the organization culture even when it promotes learning, it essentially discourages learning, because the boundaries it sets limit human agency in the process of learning.

Therefore, the findings presented confirm the view of organizational learning as a cultural process (as depicted by Cook and Yanow, 1993; Yanow, 2000b), because they show the inter-subjective meanings that inform individuals’ actions. In fact, the similarity between managers’ views across the three banks reflects potentially an industry-specific learning culture. The perceived value of education and the
systems of qualification in the sector act as guiding principles when seeking employment in a bank and as the written and unwritten rules that need to be followed if one is to have a career in banking. Therefore, individual learning is as much a reflection of individuals’ personal interests and histories as it is a reflection of their social identity and the regulating impact of the professional culture, which they embody. Consequently, individual learning is an avenue of understanding the ‘collective mind’ (Weick and Roberts, 1993), which reflects the mental models that define the meanings ascribed to learning, both in relation to learning at the individual level and the organizational level. Moreover, managers’ learning is a reflection of the institutional identities of managers as they seek to respond to local concerns in unreflective behaviours that maintain the status quo.

**The Institutional Identity of Individuals’ Learning**

The interlocking contexts and the politics of learning reflect the institutional forces that transcend across levels and units of analysis, capturing the politics of embeddedness (DiMaggio and Powell, 1983; Uzzi, 1996, 1997). These forces define the professional identity of individual learners reflected in their efforts to fit in. Therefore, the learnt identity of being a bank manager as evident from the findings affects considerably the perceived nature and approach to learning itself. In other words, managers’ efforts to pursue learning in a meaningful way are shaped by the identity that they themselves seek to maintain. Put differently, if managers were genuinely encouraged to learn, then chances are their learning could throw into question the institutionalized norms, regimes of practices and policies within their employing organization, and in relation to the trends in the sector (Henderson, 1997). Instead, the impact of their learning on the organization is limited, because they only seek to learn in ways that maintain rather than challenge the status quo (see Antonacopoulou, 1999, 2004). Therefore, learning is exploitative (March, 1991) and limited in scope, promoting consistent behaviour within the dominant regime of truth (Foucault, 1978).

This characteristic is particular to the banking sector, as other studies have also shown, that the dominance of institutional isomorphism, particularly in the context of change, is encouraging managers to copy others/imitate (as one manager in bank B put it ‘monkey see, monkey do’) rather than innovate (Clarke and Newman, 1997; Morgan and Sturdy, 2000). The attitudes of managers in the banking sector in relation to learning, education, training and development are also consistent with findings from studies across different sectors of the economy in the UK, which suggest a wider trend in the UK society at large (Maguire et al., 1993; Rigg, 1989; Taylor and Spencer, 1994).

In the light of the findings presented in this article, considering that individual learning is shaped significantly by contextual factors, perhaps there is scope for arguing that individual learning in some respects is as good as the organization context in which it takes place. This point suggests that currently we have limited evidence about the reciprocal relationship between individual and organizational learning. The organization may affect individuals’ learning, but the reverse is less evident to be the case. At best, individual learning reflects/mirrors (at least in the three banks in the study) the lack of organizational learning (see Figure 3).
Therefore, if we are to understand better the relationship between individual and organizational learning, we need to first appreciate that our assumptions in organizational learning need to carefully reconsider the assumptions we make about the embeddedness of learning in different contexts across levels of analysis. Furthermore, it is critical that we rethink the psychosocial dimensions of learning and the way these act as conditions, affecting the way learning transcends across levels and units of analysis as it reflects the political dynamics of individual and organizational learning. If we understand better the complex nature of learning in organizations, we can move the debate about the relationship between individual and organizational learning to more fully reflect the social complexity of learning as an emerging process of negotiation.

The findings of the study reported in this article suggest that such negotiation would be as much about what is meant by learning as it would be about what drives the desire to learn and to make learning a socially and culturally acceptable process, supported by a diverse set of values and attitudes (see Fiol, 1994). It is also critical to consider what underpins the process of learning and to acknowledge that the political nature of learning makes it essentially a process of interpreting the signals received within the particular context and the inherent discourses that give learning the particular meanings it acquires, for it to be meaningful to those who engage with it. Maybe here lies too the essence of understanding why learning, despite best efforts to measure, coordinate and assess it, frequently ends up to be a slippery concept. Clearly there is much scope to examine more carefully the language people use when they refer to learning, as this can be a valuable source of the discursive discourse that influences the relative importance attached to learning and the actions people take if they are to reflect what learning means to them.

**Conclusion**

This article discussed the nature, context, content and process of managerial learning, as a basis for understanding the relationship between individual and organizational learning. The evidence from a recent longitudinal study of three retail banks in the UK has demonstrated the interplay between managerial learning at the individual level with management learning at the organizational,
sector and wider societal level. From this analysis it is evident that the relationship between individual and organizational learning is much more complex than we currently assume it is. At the most basic level the relationship between individual and organizational level is not reciprocal. The organizational context in which learning takes place is seen to have the most significant bearing on the meanings ascribed by individuals to learning, how they go about learning and what they seek to learn. Individual learning is not seen to have a significant impact on organizational learning, predominantly because it is limited within the existing dominant learning structures, which reinforce rather than question the existing status quo. Therefore, if we are to make progress in our understanding of the issues in organizational learning, we need to move our focus from asking whether individual and organizational learning are related, to considering how does the interaction of individual and organizational processes create conditions that underpin the social complexity of learning in organizations.

Acknowledgements

The ideas presented in this article benefited from the much valued comments of Professors Chris Argyris and Christine Oliver. The feedback received from the three anonymous referees has also been very helpful in sharpening the contribution of the article. Finally, I would like to acknowledge the support of the ESRC/EPSRC Advanced Institute of Management Research under grant number RES-331–25–0024 for this research.

Notes

1. The infamous words of Argyris and Schön (1978: 9) were that:

‘There is something paradoxical here. Organizations are not merely collections of individuals, yet there are no organizations without such collections. Similarly organizational learning is not merely individual learning, but organizations learn only through the experience and actions of individuals. What, then, are we to make of organizational learning? What is an organization that it may learn?’

2. For the purpose of this discussion, reference to context builds on existing notions of contextualism (see Pettigrew, 1985), which emphasizes sensitivity to the environmental conditions, as well as to the coherence of internal practices within organizations. However, context is also used in this article to emphasize the dynamic interactions between environmental and organizational practices and in particular, to place individual characteristics as a part of this dynamic interaction. Individual, organizational and social issues are seen as part of the same whole referred to here as a context. In relation to the research findings presented, context embraces the individual bank manager, the organizational practices of each bank in relation to learning, the wider learning and education trends in the banking industry and more importantly, their dynamic interaction, which is seen to shape the nature, approach and orientation of learning. The analysis is intended to show the interaction between the characteristics of the national culture and the industry-specific characteristics (the societal level) with the
organizational policies and practices in relation to management learning (organizational level) and their impact on individual learning (individual level) (see Figure 1).

References


**Contact Addresses**

Elena P. Antonacopoulou is in the Advanced Institute of Management Research and GNOSIS, Management School, University of Liverpool, Chatham Building, Liverpool, L69 7ZH, UK.

[Email: E.Antonacopoulou@liverpool.ac.uk]