

Course: BMPF7103

Title: Review of Professional Learning

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1.0 Introduction

This Review of Professional Learning provides insight into some of the significant elements of my professional learning to date. Education Scotland (2023) suggests professional learning should be: “Challenging, and develop thinking, knowledge, skills and understanding; underpinned by developing skills of enquiry and criticality; interactive, reflective and involve learning with and from others”.

I have embraced reflective learning, “an intentional process, where social context and experience are acknowledged, in which learners are active individuals, wholly present, engaging with others and open to challenge and the outcome involves transformation, as well as improvement of both the individual and their organisation” (Brockbank and McGill, 2006, p.6).

2.0 Approach to Learning

Honey and Mumford’s (1986) Learning Styles Questionnaire, scores me: Theorist 6, Activist 13, Reflector 11, Pragmatist 11 and highlights learning by theorising or drawing conclusions, as my least preferred learning style. This aligns with findings from the NERIS (2023) Personality Type and IHHP’s (2023) Emotional Intelligence score (Appendix 1) assessing my preferred style as Activist.

My learning approach to date (Appendix 2), has focused on continuously growing new technical and self-knowledge, which has input to the components of my unique professionalism and practice and how I draw upon this to deliver results.

3.0 Professional Experience

My professional experience is documented in the attached annotated CV (Appendix 3) and Timeline (Appendix 4). The major theme has been leading business growth, transformation and the creation of business, shareholder and customer value. I am currently a self-employed, Management Consultant and Project Manager (see Job Description Appendix 5, prepared for this review).

4.0 Themes

This Review of Professional Learning consists of three reflections providing examples of significant learning.

4.1 Power of Mind-orders in Personal Development

Operational Context: *“my predominant mind-order during the period of my corporate working life between 1985 - 2015 and subsequent self-employment”.*

Constructive-Development theory of development in adults proposes five stages or “orders of mind”, through which people may develop (Kegan 1982, 1994, cited in Berger, 2003,

2007, pp.1) . It describes how people change during their lifetime and is “concerned both with the *construction* of an individual’s understanding of reality and with the *development* of that construction to more complex levels over time” (Berger 2003, 2007, pp.1). This has helped me reflect on, articulate and understand the various mind-orders in which I operated during my personal and professional development, and plan my future development within the context of higher mind-orders. Transformative learning occurs when a person changes, “not just the way he behaves, not just the way he feels, but the way he knows-not just what he knows, but the way he knows” Kegan (1994, pp17). In undertaking this review, I have gained new insights and defined actions to continue my learning and development.

For most of my corporate life I held senior leadership roles, and practiced my professional disciplines. I conceived, designed and delivered much value-based transformational change and practiced elements of all three dimensions of meta-leadership (Marcus et al. 2015). I considered myself highly adaptable, as I moved from position to position with relative ease, performed consistently well and gained bigger jobs.

I operated in The Fourth Order, the Self-authored Mind (Berger, 2003, 2007, pp.7). I became part of and fully invested in the organisations and the professions I represented, evidencing “Institutional Balance” (Eriksen, 2006, pp.294). I focused on career development, operated with autonomy, self-dependence, commitment, championed causes and strategies, had a strong sense of self, self-authored and owned my behaviour. I was highly adaptable and acted with “self-possession that at times may seem not to need others” Kegan, (1982, 1994), cited in Eriksen, (2006), pp.295).

When I suffered stress and tiredness, I fell back into The Third Order; the Socialised Mind where my thinking, impulses and desires were influenced by “the ideologies, institutions, or people that were important” (Berger, 2003, 2007, pp.5) or, my “Board of Directors” (Kegan, 1994, cited in Berger, (2003, 2007), pp.5). The source of much of this was my formative “values, ideals, and beliefs” (Kegan 1994). I often overworked, for reasons including: not to be left behind; to have things; to confirm (or prove) self-worth; to provide for family (Porter, 2004 pp.425-428). I also worked to use and experiment with the tools of my formal professional learning. I held the values when starting out and in mid-career, listed in Appendix 6.

I observed the conflict described by Berger (2003, 2007), when facing the decision to choose between job offers. I over-analysed to the point where I undermined the strengths I demonstrated in being offered the role. I had no clear idea of what I wanted outside of my view of what I believed others expected of me. It hugely impacted my job choice decisions, as it sat at the core of my identity, need for recognition, and to be seen to be doing the ‘right thing’. I was mainly learning through experience, reflection and planning, but recognise I placed less emphasis on abstract conceptualisation to gain alternative perspectives and potential courses of action (Kolb, 1984).

For much of my life, I had no definitive “independently constructed self to feel good about” Berger (2003, 2007, pp.5) and tended to define myself by my job. In 2015, I took voluntary redundancy, as I was burnt-out. Initially, I blamed the toxic culture, extreme cost-driven change and continuous pressure for growth. I now recognise at these times, I reverted to operating in the Third Order, Socialised Mind (Berger, 2003, 2007) and felt tension between

what I was rationally observing and the strong defensive emotional response of feeling undervalued, not good enough and pulled in many directions. I was 'stuck' in the situations I found myself, due to my socialised mindset, unable to reframe or proactively choose an alternative route.

Leaving BT Global Services, forced me to reflect, reframe and redesign my work and career (Witherspoon 2014, pp.263). This process could have been quicker and less painful, had I used a more systematic approach and carried out my reflections and analysis in a more effective way. Using Kolb's Learning Cycle (Kolb, 1984) as an example, whilst I instinctively used all stages of the cycle, I could have made faster progress by searching for and exploring more abstract conceptualisations.

I moved into self-employment and after many years of soul searching, repair, re-framing and taking positive action, I am now in transition between the Fourth Order; the Self-authored Mind and Fifth Order; the Self-transforming Mind (Berger, 2003, 2007, pp.7-9). I am redefining meaning, for me, as I become increasingly willing to live with the uncertainty of life, limitations of myself, unfair circumstances and behaviours of others. I know my ability to deliver results is a function of my attitude, competence and ability to execute (Whitten and Roy, 2020). In this, there is freedom knowing that despite the circumstances, I can create value. This is significant, as I have found confidence and clarity in ways I have not previously known. I have achieved greater alignment between my values, personality and mind-order. My ways of knowing continue to transform, as I am increasingly able to adapt, move on, grow and live in a wholehearted, deliberate way.

From this critical reflection, I understand the danger signals which cause me to revert to earlier mind-orders, and recognise quickly the behaviours of those early mind-orders. Schon's (1987) Reflection on Action, Reflection in Action and Boud's (2001, p.12) Reflection in Anticipation of Events, provide tools which I am using to monitor, regulate, re-align and where necessary, reframe my thinking to ensure alignment, operating in the Self-Transforming mind-order and my current values (Appendix 6). I am also using Witherspoon's Double-Loop Coaching to ensure I am continually Reflecting, Reframing and Redesigning (Witherspoon, 2014, pp.263).

4.2 Power of Influence in Leadership

Operational Context: *"for the construction phase of a major infrastructure programme, championing an innovative approach to the creation of a common data environment, with the aim of driving deep operational insight, process transformation and significant cost savings".*

I was asked to join a meeting with the aim of identifying and delivering large value efficiencies and productivity improvements. It was agreed I would manage the project initiation, gain executive and client support and funding. I positioned myself to lead the project, which kicked-off in March 2023 and tackles a complex, persistent problem.

Middleton (2007, pp.1) suggests the position of leadership given by a role is not the only leadership, "often you're not in charge: in fact no one is. There is no budget. And there are no people who have to work for you". She suggests "leading beyond authority" is about

“earning legitimacy with ideas that resonate - and an approach to leadership that means people end-up willingly granting authority to you” (Middleton, 2007 pp.2).

Using Mezirow’s (1978) Level of Reflection Model, I reflect on where I believe, I chose to lead beyond authority.

Reflectivity:

I decided I would position myself to lead this initiative. I had several reasons for doing this including, extending my contract, but mainly because I had an understanding of the challenges facing the business and held a vision for what ‘could be’, if the proposed approach was successful. I was excited, as there would be huge learning for me and the business, in this leading-edge application of technology. The need for me to lead beyond authority (Middleton, 2007) and to influence many stakeholders, was critical to success.

Previously my experience of influencing others had been mixed. Often when championing and initiating projects I delivered impressive results. Sometimes I have lost confidence and felt my influence weakened, partly due to over-focus on delivery, but now realise mainly to do with mind-order, as a backslide, can result in loss of clarity, confidence and a feeling of ‘it is me against everyone else’. I viewed others as judging me, rather than taking time to reflect, accurately understand their positions, modify my approach and develop a strategy, which wins-over, renews or confirms support.

Affective:

From the start of the project, I recognised that I needed to lead beyond authority (Middleton 2007) and fully assume the position. At times in the past, not doing this has prevented me from fully believing I was capable and really had the position and power to create change.

I am aware that this work has risks, which I have the power to mitigate, eradicate, or accept. The way in which I go about positioning and managing these with relevant stakeholders will be crucial in gaining authorisation, budget and continued support. Previously, I was so caught up in delivering the vision, I sometimes operated too independently and did not optimally understand and satisfy the needs of other stakeholders. Without this, stakeholders can feel left out, threatened and may withdraw support or change position. Despite their concerns about the high investment cost, effective stakeholder management has enabled the necessary support through initiation, approval and so far, in implementation. My approach has been praised.

By following my intuition, to lead beyond authority and pioneer this innovative project, I feel I am drawing upon and applying many elements of my past professional learning, and performing at a high-level, with increased impact.

Discriminant:

What is really going on is I am aware that if I become defensive, I push harder toward delivery. The outcome of this, is that stakeholders probably feel threatened, uncomfortable, insufficiently involved and lose confidence. I am therefore, focused on operating in the Self-transforming mind-order (Berger, 2003, 2007) and practicing the power of influence.

Judgemental:

Previously value judgements I made were negative towards me, with the belief I wasn't good enough, as I knew deep-down I was not managing stakeholders as effectively as I should have been. This undermined my ability to maintain the necessary level of influence and this occasionally made me feel, others had a different agenda, that was not always in my best interest.

In delivering this project, I have proactively used Schon's (1987) Reflection on Action, Reflection in Action and Boud's (2001) Reflection in Anticipation of Events. These tools have helped me resist spontaneous emotionally motivated interventions. Using planned-in time for reflection before acting, I have been more effective, more considered, kinder to myself and more able to recognise my own needs, fears and vulnerabilities. I have been able to challenge myself, when making judgements, plan or modify my responses. An example is, due to delivery timescales, my project could not become dependent on another project and I needed to find a way of accessing critical data under the control of the other project. I used Gibbs' Reflective Cycle (1988) to challenge my judgements about how the Head of Planning would react to the threat to his project and the sharing of data. I considered the problem from multiple perspectives and decided to approach it in an open, empathetic way. The data was made available the following day.

The time I took for reflection diffused my emotions and helped me anticipate how the various actors in the situation would respond. This reduced my stress and achieved a quick and acceptable outcome.

Conceptual:

This course module is challenging me to think about my approach to evaluating the situations in which I find myself. There have been situations where my natural tendency to action has not enabled me to manage optimally. This failure to reflect has at times, reduced my awareness and I have missed opportunities to reframe and take an alternative, more effective approach.

Psychic

Using the example above, I recognise I made a judgement about the Head of Planning. I expected him to be defensive, and un-co-operative, but I was wrong. We will need to talk again regarding duplication of work, and this conversation will need careful handling. I will use Boud's (2001) Reflection in Anticipation of Events, together with Mezirow's Reflection Model (1978) to prepare.

4.3 Transforming BT Global Services in UK Utilities and Renewables Market

Operational Context: *I was asked to re-launch the business into the UK Utilities and Renewables market, and to lead multiple Key Account Managers (KAMgers) to achieve £120 million incremental revenues in year 2.*

In developing relationships with a key customer, KAMgers objectives include: gaining visibility of the customer's needs; sharing understanding of the account within the KAMgers organisation; developing proactive strategies, ensuring resources and investments are prioritised; co-ordination of global activities; achieving desired profitability and growth and

reducing account risk and security (Woodburn and McDonald, 2011, pp.295).

For reflection on the operational context above, I will use Witherspoon's (2014 pp.263) Double-Loop Coaching for Leadership Development. This involves using three practices that assist leaders to reflect on their thinking and action in specific scenarios:

- **Practice 1: Reflect:** leaders challenge their frame of reference enabling increased insight, asking improved questions and identifying more options for taking action;
- **Practice 2: Reframe:** leaders shift their thinking, enabling them to identify and consider alternative interpretations and invent, trial and reframe for future scenarios;
- **Practice 3: Redesign:** leaders identify what and how to change their leadership mindset and behaviours and design pilots to test and revise how they think, act and deliver results.

Reflection:

I recognised the KAMgers were overloaded with work and relatively little new business had been won in recent years. The challenge to build business, was a concern. I had no idea how to achieve the target. The KAMgers knowledge of their sector was not strong; few had quality relationships with their client's C-level executives, therefore, the opportunity for strategic transformation conversations was limited. If progress against growth target was to be made, reframing of the business and KAMger teams was needed.

Reframing:

A reframing of the vision and strategy for the sector business was essential. As a pioneer, this excited me, but was daunting. I drew upon previous experiences of similar market challenges, where the path to the end-game was unclear.

I reframed by reimagining the business as the market leading provider with the strongest technology and business transformation proposition, best marketing and sales. I used my professional learning and past experience to 'aim high and then higher again' in terms of vision and strategy. I wrote the initial strategy, but recognised that it was not sufficiently robust due to gaps in my and the business' knowledge. This was a massive concern and I needed to be creative. My reframing revealed the need for deep market insight from a 360-degree perspective, to co-create the vision and strategy and to refine this with customers, market analysts, leading industry bodies, universities and ex-CEOs. This was a massive shift in thinking and approach. Through this, a sub-optimal attitude, knowledge and skills gap was identified for KAMgers and the wider business.

Re-designing:

Pressure was placed on me to deliver results and 'just get something out there'. I knew if I did this, the strategy would never be implemented, nor the necessary results achieved. I resisted the immediate pressure, but worked harder with the team and business leaders to re-package the service value propositions. My leadership style was consistent with my long-term style of collaborative, Servant Leadership (Jaramillo et al, 2009, pp.260) and enabled me to ensure that the needs and views of customers, the business and those involved in delivery, including KAMgers were considered. Throughout, I critically reviewed my leadership approach, asked for feedback from the team and where necessary, made changes to thinking and behaviour. For example, I realised I had not given sufficient

attention to reinforcing the vision and strategy and shifted my thinking to hold more frequent review meetings with business unit leaders and run roadshows, to promote understanding.

In parallel, the marketing and KAMger approach was redesigned and driven through insight-led Account Based Marketing (Burgess and Munn, 2017). The KAMger team was re-structured and strengthened and insight-led training provided by ex-utilities CEOs. KAMgers were encouraged to use self-directed learning (Morris, 2019) and to ensure their skill development was relevant to their customers' needs and maturity (Dall'Alba and Sanberg, 2006, pp.400). A learning and sharing culture within the team was encouraged, where best practice was shared, challenge and constructive feedback encouraged and formal lessons applied (Senge, 1990, pp.241).

A key lesson from this experience is the power of a learning culture within a team and individuals, as well as the impact of Servant Leadership on KAMGger performance (Jaramillo et al, 2009). My reflection is that during my corporate career, across multiple sectors, reporting to Chief Executives, Managing Directors and senior leaders, I received little input to training needs, personal development plans and very little feedback or coaching and there was an absence of a true learning culture. It was evident that in the Utilities business, earlier learning had not been renewed or forgotten, also, the KAMgers had little concept of how to manage their own learning, for the benefit of themselves and the business. Attitude, competencies and ability to execute had all decayed, with a detrimental impact on results. By reflecting, reframing and redesigning, the business was transformed. KAMgers were able to take full advantage of the learning culture and broad support provided, but also to self-direct their learning, which for most, improved their ability to survive the heavy demands, as well as improve the performance of their key account. At the time, I had not realise that this was double-loop learning.

5) Past Learning and Future Intentions with D.Prof Research

My learning from experience, reflection and academic and professional learning has concluded that organisations are poor at creating a learning culture and senior leaders place insufficient priority on how KAMgers “understand and perform their practice” and how this is the foundation for a KAMgers “professional skill and its development” (Dall'Alba and Sanberg, 2006, pp.405). In conclusion KAMgers:

- appear to primarily learn through experience;
- are under continual pressure to deliver results, leaving little capacity for alternative forms of learning, including reflexivity;
- are generally under-developed in their ability to undertake deliberate, self-directed learning.

Earlier in this Review, I described some of my most insightful learning, which took the course of Reflection, Reframing and Redesigning my thinking and and behaviour (Witherspoon, 2014). It took many years to complete this learning which may have been quicker had I been more effective at managing my self-directed learning and by drawing on tools acquired in preparing this Review.

It is for these reasons I have selected my focus for D.Prof research, outlined in the next section. In addition, I plan to create an interchange of data, information, and learning between my self-employed consulting practice and my D.Prof research. This will enable concepts and findings from the research to feed the development, use and testing of toolsets aimed at developing the self-directed learning capabilities and practices of KAMgers. The diagram in Appendix 7 summarises this link and approach.

6) Proposed D.Prof Research

Ford (2019) acknowledges human beings are a 'self-constructing adaptive control system, or in simpler terms, a living system' which is capable of self-shaping and building. Da Costa (2022, pp. 105) proposed a 'new Model of Personal Strategic Alignment which identifies purposes, values and beliefs, dreams, future vision, goals and competencies'. This enables an individual to: champion his or her career and life by making deliberate choices; reflect on those facets which mesh, enabling the building of an identity and the discovery of actions which clarify and help realise individual purpose. Bilal and Fatima (2020) suggest that following training, through deliberate practice and reliance on the inner coach to self-monitor and regulate, the speed of and impact of training effectiveness can be increased.

The proposed title for my research is: *'The Role and Value of Self-Management Alignment, Development Practices and Disciplines for Key Account Managers of Complex Accounts, in Building the Capabilities Required for Sustainable High performance in the Post-Covid-19 and Evolving Digital Business Environment.'*

Much of the existing research into KAM has studied the impact of KAM programmes for businesses. According to a summary by Hengspedeck et al (2022, pp.401), areas relating to KAM as an individual which are under researched, are Skills and Capabilities, Attitudes and Activities, Outcomes and Personality Traits.

My aim for this research is to understand and measure the value to individual KAMgers, of toolsets, frameworks and methods, which can be used to deliberately self-monitor, self-construct and self-build for higher, more aligned, consistent, sustainable and fulfilled performance in their roles and personal lives. My observations of the many KAMgers I have worked with over the years, is that the vast majority have not yet learned to do this. I believe my experiences, and at times less than optimal performance, outlined in this review, are not unusual and that a common need exists amongst the KAMger community for the adoption of such knowledge, attitudes and skill sets.

To help me prepare for this D.Prof research, I have created a Combined Training Needs Analysis and Personal Development Plan (Appendix 8).

7) Summary

In preparing this reflection, I have described examples of significant deep learning and acknowledge that through improved self-directed learning, I may have been able to reduce risk, avoid pain and have been in a better position to identify and create alternative opportunities for myself and others.

My aim, through my proposed D.Prof research, is to enable KAMgers to become more effective at managing their own learning to improve results, in their personal and professional lives.

Appendix 1

My Personality Type and Emotional Intelligence

My Personality Type

Using detailed profiles from NERIS Analytics (2023) I have discovered that I move between 2 personality types, which NERIS describe as: 1) “Campaigner (ENFP) is someone with the Extraverted, Intuitive, Feeling, and Prospecting personality traits. These people tend to embrace big ideas and actions that reflect their sense of hope and goodwill toward others. Their vibrant energy can flow in many directions”. 2) “Debater (ENTP): a person with the Extraverted, Intuitive, Thinking, and Prospecting personality traits. They tend to be bold and creative, deconstructing and rebuilding ideas with great mental agility. They pursue their goals vigorously despite any resistance they might encounter”.

ENTP is my stronger preference, but recognise I move between Feeling (F) and Thinking (T). These measures are concerned with how one makes decisions and copes with emotions.

My Emotional Intelligence

Goleman and Boyatzis (2017, pp.3) define emotional intelligence as: “comprising four domains: self-awareness, self-management, social awareness, and relationship management”.

The Institute of Health and Human Potential’s (2023) Emotional Intelligence Quiz, suggests I have “Good” Emotional Intelligence, which “likely has been and will be a driver of your high performance under pressure for years to come. Areas to work on: don’t forget to take time out of your busy day-to-day activities to stop and reflect on what brings you the greatest meaning in your life”

I have enjoyed my work, however, my action-orientation has at times resulted in insufficient reflection which at critical times has detrimentally impacted my choices and decision making due to over activity and lack of reflection. I will explore this in some of the reflection provided later in the Review.

Appendix 2

My Approach to Learning

How I continuously grow New Technical Knowledge and Knowledge of Self

Deep Situational Experiences:

- Roles at all levels
- Responsibilities/Accountabilities
- Sectors - multiple
- Reflection

Formal Learning:

- Academic - MBA, MSc
- Professional: marketing and banking diplomas, project management, Agile, and IT Service

Professional Memberships:

- Continuous Professional Development (CPD and Competency Framework): Chartered Marketer, Chartered Institute of Marketing
- Institute of Sales Professionals - Fellow - contribution to events, and content
- Key Account Management Forum - Cranfield University
- Praxis and Agile Business Consortium

Networking:

- Sharing and experimenting with best practice

Conferences:

- Attendance at industry conferences

Reading:

- Academic books
- Academic published articles
- McKinsey and PWC online

Personal Insight and Growth:

- Coaching (Deni Lyall (UWTSD) and Dani Savaker)
- Learning style
- Emotional Intelligence
- Personality Profiles

Inputs to shaping and building my Unique Professionalism and Practice

Components of my Unique Professionalism and Practice

Professional and Personal Agility and Adaptability:

- in new and fast changing situations
- in employment status (employed/self-employed)
- when leading, managing or consulting
- across organisational disciplines
- across business sectors

Role Level Experience used interchangeably & in parallel):

- leader
- influencer
- manager
- professional
- consultant

Breadth of Business Sector Experience:

- retail financial services
- utilities
- telecoms
- management consulting
- IT services and consulting

Breadth of Professional Experience:

- general management
- commercial and procurement
- marketing and business development
- key account management and sales
- IT services and Telecoms
- software development and implementation
- Internet of Things and Big Data
- large-scale construction and heavy plant

Programme and project management:

- global programmes
- technical projects
- business transformation and change
- agile and traditional methods

Personal Values and Beliefs:

- coaching and use of GLAS Method (www.glasmethod.com)
- Kegan (1994) - Fifth-Order: Self Directed Mind
- servant leadership (Jaramillo et al. 2009)

How I Draw upon my Professionalism and Practice to Deliver Results

I use Whitten and Roy (2020, pp.25) model:

Results = Attitude + Competencies + Execution

to examine how I am responding at any particular time and in each new and ongoing situation and to ensure each component is being reflected on and mindset behaviours and approach are modified constantly to ensure delivery of results.

As I currently operate as a self-employed consultant there is no job description or prescribed competencies.

The key measures are:

- 1) how I make people feel;
- 2) the results I achieve.

Appendix 3 (1816 words)

Annotated CV

Simon Ormston

Commercial, insightful, people oriented business leader, with successful track record of business growth. Experienced in strategy, complex value proposition and go-to-market for digital transformation, IOT, technology performance solutions and their delivery. Strong consultancy, key account, programme and project management skills. Experience of global, mid-sized, start-up businesses and multiple sectors.

Career History

So Dynamic

Jul 22-present

Principal Consultant

Developing a consulting proposition to help businesses creatively deliver sustainable high performance through building the necessary personal, team and business 'DNA'.

Annotation:

By using what I will learn through D.Prof, as well as drawing on my broad skill-set, knowledge and experience, and the GlasMethod (www.glasmethod.com), I plan to help leaders learn to apply deliberate learning strategies and tools, enabling them to be more effective in their roles, be kind to self, and ensure that what they do and how they do it is sustainable: build the 'DNA' for consistent and sustainable high-performance.

EKFB JV – HS2 Tier 1 (Agileto via GPS Consulting)

Programme Consultant (Interim)

Oct 19-present

Major Infrastructure - largest in Europe. Greenfield delivery of best of breed, technology, SaaS, IoT, big-data insight performance solutions. Team virtual: 10-65.

- Pioneered, contracted and delivered strategic data analytics and AI solution, collectively forecast to deliver circa. £100m savings by transforming construction practices.
- Procured, contracted and delivered £37m programme of third-party SaaS best-of-breed technology applications.

Annotation:

It has been necessary to lead beyond my authority and influence senior stakeholders, gain support, funding at a time of aggressive cost-cutting.

Finning Caterpillar

Business Development Director (Interim via Agileto)

Jul 17–Aug 19

Led business development, performance solutions proposition development, delivery and commercial negotiations for c.£60m+ solution. Virtual team c.30.

- Co-created Internet of Things (IoT) performance management solution, digitally transforming major construction earthworks, driving 30%+ productivity and efficiency gains. Led multi-£m complex sale, locking out competitors.

Annotation:

I was placed in a difficult scenario requiring me to ensure project was successfully delivered. I won sufficient trust of internal General Managers/teams and built collaborative co-creating client relationships, resulting in a £multi-million sale. A difficult 'tightrope' to walk - at times

uncomfortable, due to internal politics. I learned that using honest, positive, non-threatening communication and solid delivery, I was effective, able to challenge and make colleagues/ client 'look good' and feel confident.

Onwave

Director - Business Growth (Interim via Agileeto)

Feb 16–Mar 17

Led rapid growth of this innovative telecoms network integrator. Won new major accounts. Team: 3.

- Defined growth strategy, market re-positioning, sales plans to drive 200% growth in 2 years.

Annotation:

My learning related to the start-up and early phase mentality of an ambitious, impatient, ruthless, wealthy technology investor. It required the sensitivity to anticipate and deal with challenging, aggressive conversations and demands.

Agileeto

Director/Principal Consultant

Oct 15-Present

Consultancy focusing on business improvement and growth by providing programme and project management, strategy, go-to-market and digital transformation services.

Annotation:

Self-employed. Learned as a consultant how to win business, create and deliver value for clients.

Apptituda

Founder and Director (Interim - part-time)

Apr 15-Present

Founded company, defined and led go-to-market/partner strategies with Salesforce and Sage.

- Consulting business, built and launched SaaS based integrated inventory App.

Annotation:

Learned, challenges of running a small business, the required trust in colleagues and need for novel ways to reframe/solve problems, when resources and funding are constrained.

BT Global Services

Head of UK Utilities Sector

Feb 13–June 15

Led sector P&L, proposition and solutions, marketing, business development and sales into UK Utilities and Renewables. Team: 10, Virtual team: 100+.

- Delivered: qualified pipeline c.£120m, revenues: £30m+ and £4m+ incremental in Yr.1, improved EBIT.

Annotation:

Temporary role, undertaken while in transition, required continual application for permanent roles, in parallel - exhausting and a difficult balance to achieve. Exciting role requiring P&L management and the opportunity to apply full skills-set. Effective senior stakeholder management and team leadership experience was critical, as well as the ability to co-create, sell and deliver complex solutions. My performance was judged to be 'Very Good' and the 'Utilities' re-launch described as "the best ever". I was disappointed when resources were cut and targets raised to a level which I considered impossible to achieve.

I was offered the role permanently at a lower grade, but the compounding of previous disappointments and the investment made in this and previous roles exhausted me - I was burned out emotionally and mentally. I took Voluntary Redundancy without a coherent career plan. On reflection, I recognised a pattern, that at times of job uncertainty, fear for my personal security

stemming from lack of confidence/feelings of 'not good enough', impacted my mental health and job-choice decision-making.

Head of Channel Marketing & Sales Enablement, UK Corporate Sector
13

May 10–Feb

Led: strategy, proposition, channel and account-based marketing/sales enablement. Team:10, Virtual team: 50+.

- Delivered strategic business unit go-to-market plans for three divisions driving combined solution and revenues of £3.2bn+, engaging salesforce of c.700.

Annotation:

This permanent leadership role provided the opportunity to shape strategy/change within three major business units. I received two President's awards for high performance. Following restructure, role was split into smaller parts, led by less costly managers. I was transferred to BT Transition Centre. I was hurt, stressed, disappointed and exhausted by the toxic culture which developed due to years of cost cutting and extreme demands. Working in the system required levels of self-care, which in hindsight, I did not sufficiently practice. I recognise I had not always 'assumed the position', at times impacting my clarity and confidence.

Global Head of Marketing and Sales Enablement - Outsourcing

Nov 07–May 10

Led global outsourcing proposition, thought leadership, internal/external marketing/sales enablement/knowledge management and relationships with global partners/analysts/advisors. Team: 6.

- Built marketing programme, content and tools used by 1800+ sales, supporting 200+ major bids with £1bn+ order value.

Annotation:

For first 7 months role was stimulating, as outsourcing was the main thrust of the business. In month 8, the division declared £1.65 billion operating loss, a global cost reduction programme and increased targets. My role came to an end, as long-standing outsourcing deals became 'taboo'. I was placed into BT's Transition Centre (re-deployment) and was required to find a temporary role, as well as apply for permanent internal jobs. I found this unexpected change painful and stressful.

LogicaCMG

Global Marketing Director, Global Services Delivery

March 05–Oct 07

Reporting to Global Sales and Marketing Director, led marketing for global outsourcing business, responsible for global propositions, all aspects of marketing. Led international team of circa 19.

- Led global vision, integrated marketing strategy and comms. programme, moving LogicaCMG to EMEA leadership position in apps and infra outsourcing, in <18 months, delivering £400M+ revenue in Year 1.

Annotation:

Learned to appreciate the different management and attitudinal approaches necessary to lead and manage across diverse geo-cultures. On reflection, partly due to the pressure of workload and requirement to deliver outcomes, I became too task oriented and paid insufficient attention to my personal needs. As a result, I exhausted myself and was unable to support my family in the way I would have like to, prior to and following, my Father's death - a significant regret.

Marketing and Global Business Transformation Director, Global Services Delivery
05

Nov 04-Feb

Report: Senior Director. Responsibility: UK Marketing, design/transformation of go-to-market practices globally. Team: 30. Created Global function of 600+ people in multiple countries, business unit: 10,000+.

- Led work-stream to build global business creation function. Delivered: 60% cost savings and integrated go-to-market.

Annotation:

Huge role, near impossible workload/resources. Learned to:

- *lead from place of extreme uncertainty; to interpret a very high level brief to design and build a global function which integrated with 12 global workstreams;*
- *be brave, manage complexity, maintain belief in the direction I defined;*
- *to gain the support of stakeholders to implement change on a grand-scale/manage cross-culturally.*

Mercantile Building Society

General Manager, Executive Board Member

Jul 03–Nov 04

Report: CEO. Responsible for Society's general management, strategy, marketing, sales channels, customer services. Team: 130, Personnel: 180.

- Delivered business transformation increasing lending and savings by circa. 30%.

Annotation

Possessive CEO, therefore, influencing strategy was difficult, although the Board supported many of my proposals, the CEO did not always, which placed me in an uncomfortable position. For reasons of personal gain, the Chairman advised of plans for merger. I decided this was not what I wanted and looked for another role. I learned that I can become frustrated, when I cannot execute effectively.

Independent Consultant

Various Clients

Feb 03–Jun 03

Self-employed interim role. Clients: Principality Building Society, Warwickshire College.

- Assessed Welsh market for mortgages/savings and made recommendations on Society's distribution and marketing strategy.

Annotation:

Taught module on the CIM Graduate Diploma.

Gemini Consulting and Cap Gemini Ernst and Young

Senior Management Consultant – Financial Services

Jan 01–Jan 03

Provided consulting, project management and technical financial services expertise to senior managers (blue-chip clients). Specialisms: sales, marketing, distribution, transformation. Reported to Vice President. Led teams of: 5-20.

- Gained Board approval for multi-channel distribution strategy and revised operating model enabling a major life assurance company prepare for regulatory changes in long-term savings marketplace.

Annotation:

Cut-short by redundancy.

Learned, I am at my best when in a positive atmosphere, where there is mutual respect and all inputs valued.

Staffordshire Building Society

Executive Manager (Marketing)

May 98–Jul

00

Reported to the CEO. Responsible for marketing and strategic development.

Team: 25, personnel: 1600, branches: 52.

- Directed development and implementation of strategy leading to 20+% growth, retention 14%+ margin 30%+.

Annotation

Discovered the destructive impact of politics, lack of shared-values across the leadership team and leaders' hidden personal agendas which undermined many achievements and everything the Society stood for, as it was demutualised, for the personal benefit of directors. I left on a mutually agreed basis, due to a clash of values. I recognised at times I focus too much on driving progress and too little on managing complex relationships.

Coventry Building Society

Group Product Marketing Manager

Oct 93–Apr 98

Reported to Deputy CEO, responsible for marketing, product management communications and distribution.

Team: 10.

- Initiated strategic review, repositioned brand, grew lending from £0.4bn to £8bn+

Annotation

MBA thesis completed on organisational learning. MSc in Marketing Management completed using mixed-research method: "Consumer Choice Behaviour in the UK Residential Mortgage Market". Insight used to transform lending.

Education

MBA General Management	Huddersfield Business School	1994
MSc Marketing Management	Nottingham Business School	1998

Professional Education

PG Diploma in Digital Marketing	Institute of Data and Marketing	2015
Graduate Diploma in Marketing	CIM (Manchester Business School)	1997
Praxis Practitioner (Project Management)	APMG	2021
Agile Project Management	APMG	2021
Programme Management Practitioner (MSP)	OGC	2012
Certificate: IT Service Management	ITIL	2006
Banking Diploma (ACIB)	Chartered Institute of Bankers	1984
BTEC National Certificate	BTEC	1981

Awards

- 2 x BT Global Services President's Awards (Performance and Role Model).

Professional Memberships

- Chartered Institute of Marketing - Chartered Marketer.
- Key Account Management Forum - Cranfield University.
- Institute of Professional Sales - Fellow.
- Institute of Digital Marketing - Member.

Appendix 4

Simon Ormston - Timeline

Sector Experience		Building Societies		Management Consulting		Building Societies		IT, Technology and Digital Transformation			Telecoms, IT, Technology and Digital Transformation			SaaS, IT, Technology, IOT, Data Analytics and Digital Transformation						
Retail Banking								IT Outsourcing and Managed Services			Utilities and Renewals			Plant and Machinery – Digital		Construction - Digital Charity				
Operational Level		Senior Middle Mgt Head of Function		Executive Leadership & Head of Function Programme Leadership		Professional Project Leadership		Head of Function Programme & Project Leadership		Executive Leadership Head of Function Programme & Project Leadership		General Manager Head of Function Programme, Project & Sector Leadership		Head of Function Programme, Project Leadership		Self-employment Director Professional Project Leadership		Professional Programme & Project Leadership/ Transformation		Director Charity Chair Trustee
Focus of Role		Training & Org Devt		Band, Product/ Sector Stgy/Growth/Pro fitability		Business Growth Transformation		Business Advisory - Strategy & Transformation		Business Growth & Transformation		Operational efficiency and Customer Satisfaction via Service Delivery		Business Growth & Transformation		Efficiency, Productivity via Digital Transformation		Business Growth Proposition Devt		Efficiency, Productivity via Digital Transformation
Employers, Clients and Partners						Staffordshire Building Society (Mutual Departure)				LogicaCMG				Self-employment – Agileto – Director		Finning Caterpillar		Goodwith Properties Ltd		
Lloyds Bank		Coventry Building Society						Mercantile Building Society				BT Global Services (Voluntary Redundancy)		Onwave Founder and Director - Apptituda		EKFB/HS2		Cancer Vaccines Charitable Trust		GLAS Method
The Co-operative Bank						Gemini Consulting – Strategy & Transformation		Cap Gemini Ernst & Young – Strategy & Transformation (Redundancy)												
1981		1990		2000						2010						2020				2023
Roles Title								Delivery Director – SAP (3 months)												
								Global Marketing Director – Global Services Delivery (2005-2007)												
								Marketing and Global Business Creation Director (2004 – 2005)												
								Business Development Director – SAP (1 month)												
								Exec Manager – Stgy, Mktg, Sales, Service (2003-04)												
								Marketing Consultant (3 months) (2003)												
								Senior Consultant – Strategy & Transformation (2001-2002)												
								Executive Manager – Marketing (1998-2000)												
								Marketing Manager – Lending (1994- 98)												
								Group Product Marketing Manager (1993-94)												
								Head of Channel Marketing, KAM and Sales Enablement – Corporate (2010-13)												
								Managing Consultant – Transformation (2010)												
								Head of Outsourcing and Managed Services (2007-2010)												

Appendix 5 (433 words)

Job Description (prepared for this Review).

Title: Principal Consultant (Agileeto)

Role holder is capable of operating at director, general management and technical professional levels across a range of disciplines. Key purpose being to help clients achieve business objectives through provision of advice and delivery of projects and transformational initiatives.

For Agileeto, role holder develops and maintains relationships with clients and grows business by developing value propositions, identifying new business opportunities, developing proposals, managing risk, ensuring operational and financial sustainability and quality of delivery.

Responsibilities:

Provide advice and support on:

Programme and Project Management:

- Overseeing and managing complex programmes and projects, within scope, budget, timelines.
- Developing project plans, allocate resources, manage risks, and monitor progress.
- Providing leadership to client and teams.

Strategic Leadership:

- Providing strategic direction and thought leadership, leveraging expertise in management consulting, programme management, and corporate strategy.
- Collaborating with senior leadership teams to define long-term objectives, develop business plans, and align strategies with clients' organisational goals.
- Driving implementation of strategic initiatives to achieve planned outcomes.

Corporate Strategy Development

- Undertaking market, industry, regulatory analysis and defining competitive strategies to deliver revenue efficiency, and profitability objectives.

Marketing and Go-to-market Transformation:

- Developing marketing, channel and go-to-market plans which deliver clients' competitive and operational strategies.

Complex Business Development:

- Defining, shaping and pursuing major business opportunities.

Major Key Account Management:

- Engaging with key accounts to understanding business challenges, problems and developing value propositions.
- Managing key client accounts, ensuring excellent service delivery, client satisfaction and retention
- Leading client-based sessions, making recommendations and gaining clients' support for proposals.

Complex Sales:

- Sales leadership, sales strategy development, management of sales cycles and contract negotiation.
- Collaborating with cross-functional teams to ensure focus on delivering to customer needs.

Transformation Consulting:

- Proposing and leading business, operational and digital transformation initiatives.
- Supporting clients through organisational change..

Required Competencies

- **Credibility:** experience of working at and interacting with Executive and Senior Leadership levels.
- **Problem solving:** ability to conduct comprehensive analyses, reframe and solve complex problems, and recommend solutions to improve performance.
- **Strategic Thinking:** think strategically, anticipate future trends and use insights to develop actionable plans and recommendations.
- **Leadership:** ability to inspire, motivate, drive high-performance teams.
- **Marketing, business development:** ability to develop and execute marketing and business development value propositions and plans to increase image and reputation and grow customer base and its profitability.
- **Sales management:** ability to develop and execute sales plans including commercial negotiations and contractual agreements.
- **Project and programme management:** ability to lead complex projects to ensure delivery of outcomes on-time, to budget.
- **Digital technology:** expertise in delivery of digital technology, transformation, software development and solid level of knowledge of IT, infrastructure, and cybersecurity.

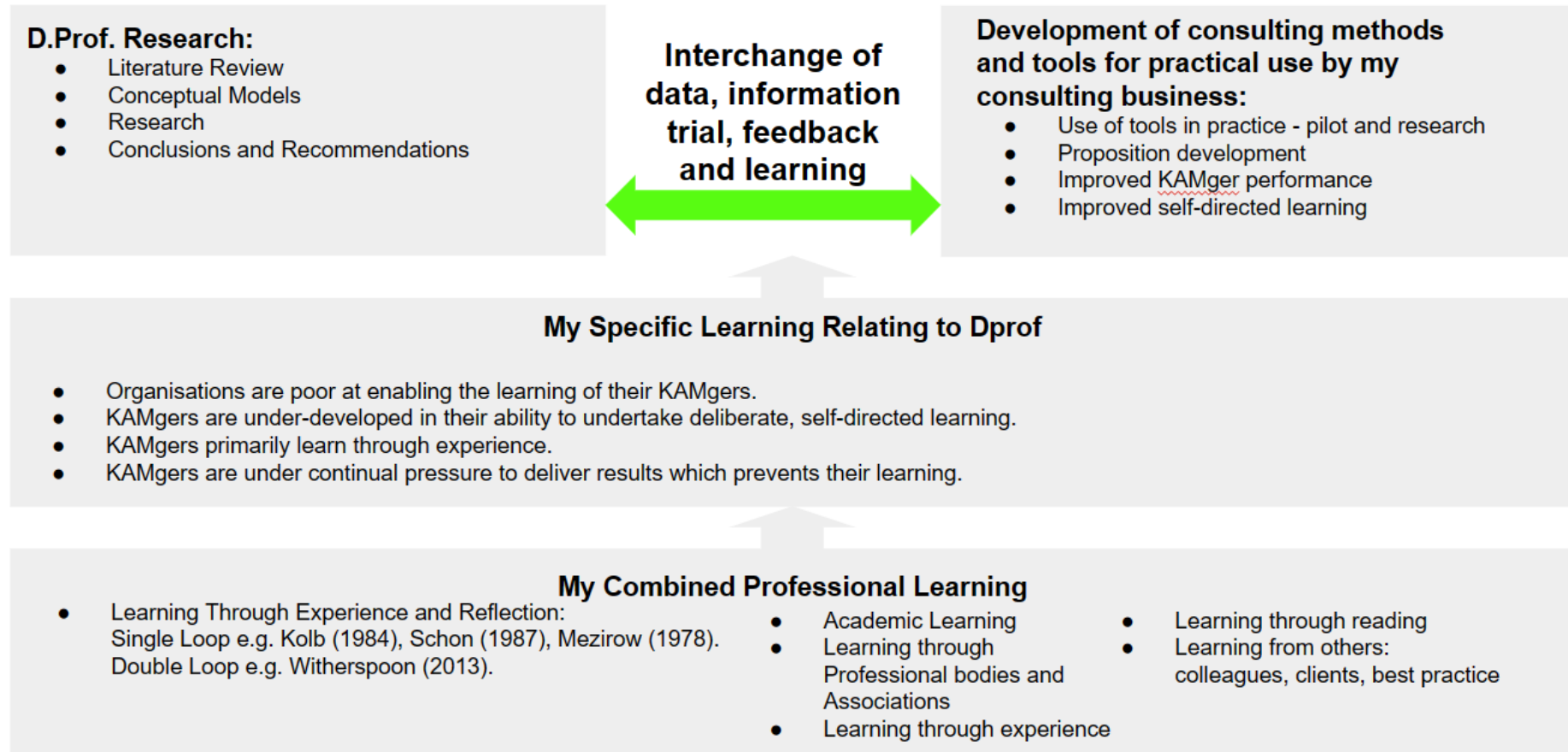
Appendix 6

Values - Then and Now

Values when Starting out and in Mid-career	Current Values
• Catch up and prove myself. • Do something 'big' and of significance. • Find what I'm good at. • Have an adventure. • Provide well for my wife and family. • Operate fairly and treat others well • Work hard and be rewarded. • "Do the right thing".	Personal and Professional morals and values - whilst I need to respect my client's values, I choose to live and work to mine: • Authenticity is central - truth is core. Speak-up where necessary, but speak louder through actions and behaviour. • Soul care, health and family is No 1. Say 'no', often, set and maintain boundaries. • My main work is to become the most wholehearted and true version of me to bring to the world. • Create value by getting to the truth of a problem, reframing and finding a solution. • Aim to maintain balance and alignment with my Glasmethood words: ○ my purpose - 'Pioneer' ○ the external - 'Possible' ○ getting things done - 'Progress' ○ relating to others - 'Engage' ○ my identity - 'Creative' ○ my strategy - 'Intentional' and 'Deliberate' ○ my motivation - 'Maintain Perspective' • Live to practice:- give myself permission to be personally transformed based on: ○ Love ○ Joy ○ Peace ○ Patience ○ Kindness ○ Goodness ○ Self-control <i>"It is not what a man does that is of final importance, but what he is in what he does. The atmosphere produced by a man, much more than his activities, has lasting influence." - Oswald Chambers</i> • Aim to build in all circumstances, grow continuously - personal growth and growth of others. • Work to leave a valued legacy. • Assume the position where appropriate, lead beyond authority, but accept that taking the back seat is sometimes the appropriate place to be. • Reflect continuously, work with mentors, live in the day and measure progress in the decade.

Appendix 7

The Link Between Past Learning and Future Intentions with DProf Research



Appendix 8 (1240 words)

Simon Ormston

Combined Training Needs Analysis (TNA) and Personal Development Plan (PDP)

TNA focuses on my anticipated training needs based on early-phase preparation for D.Prof research, personal and organisational (Agileeto/So Dynamic) development. TNA format adapted from Appendix 3 - CoESE: Training Needs Analysis Form (2019-20). Reference is also made to the Vitae Researcher Development Framework (2011)

PDP describes necessary actions to close identified gaps in this early-phase of preparing for D.Prof research personal and organisational (Agileeto/So Dynamic) development. PDP format used was adapted from Allan's (2003, pp.166) Learning Contract.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
Knowledge and Intellectual Abilities.	Knowledge base.	Knowledge base and subject Specific skills.	Competent.	Expert from the practical knowledge perspective but not the academic literature perspective.	Prepare extensive literature review.	Review 31/12/23	UWTSD library. Cranfield University KAM Forum outputs.	UWTSD librarian Professor Javier Marcos-Cuevas.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Knowledge Base.	Research design, planning and ethics.	Competent.	Successful MBA and MSc research.	Read books on Management Research.	By 30/09/23	Books: Easterby-Smith, M. Thorpe, R and Lowe, A. (1991) Management Research. Gill, J. and Johnson, P. (1991) Research Methods for Managers.	I own these books.
	Knowledge Base.	Quantitative and qualitative analysis and use of software.	Advanced Beginner.	Used both Qualitative/Quantitative/Mixed-methods of data analysis and interpretation Use of SPSS many years ago.	Identify latest software to support analysis.	TBC	Quantitative and Quantitative Analysis modules of D.Prof. Obtain software and practice using tools.	UWTSD D.Prof timetable. UWTSD Student Support Services.
	Knowledge Base.	Library and Literature searching skills.	Proficient.	Previous experience of academic libraries.	UWTSD Library for briefing and tuition.	10/06/23	Briefing.	UWTSD Academic Liaison Librarians.
	Cognitive Abilities.	Evidence synthesis and evidence review.	Competent.	Previous experience gained via MBA and MSc.	Practice as part of academic writing.	Review 30/09/23.	UWTSD academic writing course.	Feedback from UWTSD Tutor.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Cognitive Abilities.	Systems thinking analysis and problem solving	Proficient	Problems are solved daily in work, but use of systems thinking is less frequent.	Compile a systems thinking toolkit. Practice use inwork and academic thinking.	31/10/23	Books and peer-reviewed articles.	UWTSD Library.
	Cognitive Abilities.	Preparation of Literature Review	Competent	MBA, MSc.	Begin pulling together relevant references.	Review 31/12/23	Books and peer-reviewed articles.	UWTSD Library.
	Creativity.	Critical thinking skills and creativity.	Proficient	Use critical thinking and creativity daily in work.	Compile a diverse critical thinking toolkit. Apply to work and academic thinking.	30/07/23	Books and peer-reviewed articles.	UWTSD Library.
	Creativity.	Academic argument, structuring and writing skills.	Competent	MBA and MSc, however, last academic submission was 20+ years ago.	Attend an academic writing course. Practice structuring answers and responses.	TBC 30/09/23	UWTSD academic writing course. Or, OU academic writing course.	UWTSD D.Prof timetable. Approach Doctoral College to identify suitable courses.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
Personal Effectiveness.	Personal Qualities.	Enthusiasm, perseverance, integrity, self-confidence, self-directed learning and taking responsibility.	Expert	Track record.	Compile and utilise a toolkit of learning and reflexivity models.	30/09/23	Books and peer-reviewed articles.	UWTSD Library.
	Self-management.	Study strategies including stress/time-management.	Proficient	Reflection on previous studies have identified successful past strategies.	Adopt previously successful strategies. Continually reprioritise demands client-based work.	Ongoing, review 1st of each month	Learning Journal. Accountability. Books: Get Things Done (Allen, 2001). How to Keep Your Doctorate on Track (Townsend et, al. 2020).	Seek advice from Doctoral College. Deni Lyall, Coach (UWTSD). I own. I own.
	Professional and Career Development.	Build Consultancy Proposition.	Expert.	Track record of developing complex value propositions	Build an initial value proposition and publish via consultancy website.	30/09/23	www.glasmethod.com Evolving www.SoDynamic.com .	Adventure Graphics: Penny and Warwick Kay. Dani Savaker.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
Research Governance and Organisation.	Research Management.	Research strategy.	Proficient.	MBA and MSc.	Outline strategic plan for research.	31/12/23	Examples of Strategies.	UWTSD-Library/Doctoral College.
	Research Management.	Project Management and Agile.	Expert.	Qualifications held, work related projects successfully delivered.	Assess approach, agree and adapt for each academic submission.	On-going	www.praxisframework.org .	Deni Lyall, Coach (UWTSD).
	Professional Conduct.	Ethics principles, sustainability, IPR/copyright.	Competent.	Track record of managing.	Read up on requirements and best practice.	30/06/23	UWTSD Reference material.	UWTSD-Tutors/ Doctoral College.
Engagement Influence and Impact.	Working with Others.	Collaboration, networking influence, leadership and people management.	Expert.	Daily networking at all levels.	Identify academic contacts.	31/12/23	Build and use contact list.	Cranfield University-KAM Forum.
Professional Development.	Project Management.	Agile project management.	Competent.	Hold APMG Certificate in Agile Project Management and history of successfully managing Agile projects.	Study to Practitioner level exam.	31/12/23	www.APMGinternational.com	www.raikhannaassociates.co.uk

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Project Management.	Systems thinking - to overcome resistance to change. LC01 Think Holistically: 1.1.3 - fit to problem context, 1.1.4 - boundaries and interfaces, 1.1.5 - manage impact/implications of proposed changes. A Framework for Performance Based Competency Standards for Global Level 1 and 2 Project Managers (pmprofessions.org).	Competent.	Training, years ago on MBA.	Refresher and practice required.	30/07/23	Build toolset to support application of systems thinking to overcome resistance to change.	Gain feedback from Project Sponsor: Dominique Corvez. UWTSD Academic Librarians.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Project Management.	Use data and prototyping to test/validate.	Competent.	Currently use data extensively.	Improve the diversity of data analysis to support, test/validate ideas.	30/07/23	Improve insight and decision-making by using alternative data/data-analysis techniques. A Framework for Performance Based Competency Standards for Global Level 1 and 2 Project Managers (pmprofessions.org).	Input from data specialists in team/business.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Project Management.	Engage Collaboratively: Nurture relationships - with specific senior stakeholders.	Expert.	Currently create, build, maintain good relationships at all levels.	Improve engagement and communication of project value-add to several specific senior stakeholders.	30/06/23	Increase number and quality of meetings/conversations/documentation.. A Framework for Performance Based Competency Standards for Global Level 1 and 2 Project Managers (mosaicprojects.com.au)	Obtain feedback and measure engagement.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Key Account Management and Sales.	Understand detailed competencies for KAMgers success.	Competent.	Experience in role.	Understand in detail competencies required for effective key account management.	Ongoing - review at 31/12/23.	Identify appropriate peer-reviewed literature. Competencies for Key Account Managers, (Woodward, 2006. pp.18).	UWTSD Academic Librarian Support Networking with researchers/academics from other Universities e.g. Warwick, Cranfield.
Organisation (www.Agileeto.com).	Proposition development.	Build value-proposition for consultancy business.	Expert.	Built and implemented many different value propositions.	Ensure an interchange of data and information, trial and learning between work on DProf and the methods and tools. for practical use by my consulting business and in doing so build sustainable value propositions.	Ongoing but review at 31/12/23.	Data, ideas, content from whatever appropriate resource. Book: Selling Your Value Proposition (Barnes et, al 2017)	UWTSD library and academic teams and my clients. I own.

Training Needs Analysis					Personal Development Plan			
Domain	Sub-Domain	Specific Categories for Development	Existing Skill Level: Novice to Expert (Dreyfus and Dreyfus, 1986)	Evidence of current/ previous training	Actions for additional development	By When	Resources	Who will I engage to Help?
	Formalisation of Competencies within Agileto.com	Formally adopt competency frameworks for: 1) Project Leadership in Complexity; 2) Programme and Project Management; 3) Management Consulting; 4) Chartered Institute of Marketing; 5) Change Management.	Estimate of competency: Competent Expert Competent Expert Competent	Practical experience. Praxis Practitioner. Practical experience. Chartered Marketer. Practical experience.	Complete a gap analysis of recent/currently evidenced competencies against each of the competency frameworks and define specific development actions and where support is required to achieve necessary development..	All: 01/05/2024	1) Leadership in Complexity 2) www.Praxisframework.org.uk 3) Chartered Management Consultant Framework - MCA 4) Professional-marketing-competencies 5) change-management-institute.com	Frameworks from relevant Professional bodies.

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