

**LEARNING UNCUT EPISODE 29:  
FREEDOM TO LEARN – KATE JARVIS**

Michelle Ockers: Welcome to another episode of Learning Uncut. I'm Michelle Ockers.

Karen Moloney: And I'm Karen Moloney.

Michelle Ockers: And today we're talking to Kate Jarvis, the Learning and Capability Manager from Farmers' Mutual Group about their learning strategy, which has the rather exciting title of "Freedom to Learn". Welcome, Kate.

Kate Jarvis: Thank you. Great to be here.

Michelle Ockers: And Kate, can you kick us off by introducing the Farmers Mutual Group?

Kate Jarvis: Yes, certainly. Farmers Mutual Group, or, known as FMG commonly in New Zealand, is a really well-respected rural insurer. We've been around for over 100 years, so got some really good solid roots in the country and really a respected brand. So a real positive footprint in New Zealand.

We're across 27 sites, so we are quite geographically spread. We do have a mixture of roles across our organisation that my team enable through learning. So a real mixture from mobile, to phone based, to some more behind the scenes activity that need to happen around claims.

We have really high employee engagement and actually high client engagement as well. So we do rate really well as an organisation with our employees and also with the client perception of us. One of the points of different is a direct client relationship. So we don't have brokers, and so there's a lot of emphasis placed on the intimacy of the relationship with our clients and the importance of that relationship.

FMG's a really values-driven organisation and that definitely comes through in how we do things and how we actually interact and behave as an organisation, both internally and externally. So it really is a great place to work.

Michelle Ockers: You joined FMG in the role 18 months ago. Can you give us a feel for your early observations of learning in the organisation and how they may have matched the expectations around employee experience?

Kate Jarvis: So definitely, what was really apparent right from the start, and actually comes through in the external branding as well, is that real commitment to employee growth and development. So I did absolutely notice that. What I also noticed was we favour a more traditional approach to learning in the organisation. So quite heavily classroom-based focused and also heavily ... We do make quite a large investment in external training. Being an insurance organisation, there is a heavy compliance and technical focus to a lot of the training as well. So yeah, a real commitment to supporting employee development, but the way that we do that is in quite a traditional way. So that was definitely my early observations when I came in.

Michelle Ockers: Right from the get go, you were keen to create a new organisational learning strategy. Why did you feel it was important to do that, and what were you trying to achieve with creating a new organisational learning strategy?

Kate Jarvis: Yes. I'm really passionate about this, because I do a lot of reading and I keep myself quite well up to date with where things are trending and what the future ... where it's shaping like. I mean, we're already in the future, to my mind anyway. And just that whole concept of organisations and needing to be more and more flexible and adaptable in order to actually achieve some sustained success.

And while FMG has been highly successful and still is, we know that the landscape is rapidly changing and we know that employees are changing their expectations around what their experience at work needs to be like and how their development and growth is supported. So I knew that we actually needed to be in front of that and actually lead the way with some of that thinking in order to be able to help FMG continue to be successful on into the future.

We do have some quite aspirational goals as an organisation, so I saw it as a real opportunity to actually, let's lead some of this thinking, let's get in front of this and really show the need for L&D to evolve in our organisation in order to be relevant for the future, and also help FMG achieve that. Another 100 years of great success.

Secondly, my team were really in urgent need of having a sense of identity and purpose and direction beyond the day to day delivery, so we tended to work in quite a reactive way. As I said, a lot of the delivery is heavily classroom-based. So there was a real sense of kind of Groundhog Day within the team. And the team had gone through quite a significant period of change, which had been challenging for them. So I really saw the need for the team engagement and the team wellbeing to ... the need to have that future sense of vision, optimism for the future, and a real sense of importance and identity to helping FMG be able to move forward really successfully. So they were probably the main things that made me feel really passionate about needing to do this.

Michelle Ockers: Yeah. It's interesting, the perspective on what it felt like for the team. We talk about the learner experience and that it's not pleasant or enjoyable as learners. I think also, it's not that pleasant or enjoyable at times for the learning and development team themselves, and the people in the team.

Kate Jarvis: Absolutely, yeah. And they need to be empowered to actually do that. And that's been a really big driver for me, as well.

Michelle Ockers: An interesting aspect to your story is that you're ahead of the curve in terms of coming in and wanting to strengthen your organisational learning strategy when your people and culture strategy and framework and processes were relatively traditional at the same time. But, you decided to forge ahead, create a contemporary learning strategy rather than wait for

your people and culture strategy to be updated. Why did you do this? And how did that affect the work you did on your strategy?

Kate Jarvis:

That's a great question. At the time, when I came into the role, we actually had no GM of HR. And there'd been quite a period of time where the HR group had had no senior leadership and no seat around the executive table because of that. So I was really aware that yes, ideally the learning strategy would be one of the pillars that kind of enabled the broader people strategy. And while I knew that, I felt that the risk of waiting for that was greater than the risk of actually forging ahead, because I just saw such a booming need for it. Not only for my team, but for it to start to really sow the seeds for direction and the organisation. So yeah, that was kind of why I decided that I was going to forge ahead with it anyway.

And it has made it probably more challenging to implement the strategy, because that broader kind of mandate and mantel wasn't there from the onset. So what we've chosen to do is sort of work a little bit by stealth, I guess, and do a bit of a soft introduction of the thinking and the vision, and starting to do some things differently, rather than kind of launching an overt launch of the strategy. So yeah, it has certainly created some challenges with it, but I've certainly got no regrets about forging ahead with it. And it's actually helping to inform the people and culture strategy, which we're now developing.

Michelle Ockers:

Yep. It's tricky to forge ahead with doing things in a more modern, contemporary way with learning if you're out of step in other parts of your environment and your culture.

So let's talk about how you actually created your learning strategy. For example, what processes, what tools you used, who was involved. What did you actually do to build the learning strategy?

Kate Jarvis:

It was a real collaborative effort, and that was really deliberate on my part. Because, in my previous experience with developing strategy, I hadn't taken as collaborative an approach and I saw some pitfalls to that. And so I've really wanted the team, and actually even the broader people and culture team to feel like it was actually our strategy and that we actually developed it together and we're collectively driving that and collectively owning it.

So it was mainly a collaboration from our people and culture group, but as we kind of formed the thinking, we did actually, in an informal way, test out or validate some of the ideas or thinking with some of our stakeholders. How I went about it ... So, I actually used a couple of McKinsey's models to help to kind of capture the thinking and pose some questions, to be able to gather the thoughts and ideas in order for us to then be able to create the future state.

So I used a business canvass model, which is really great for, again, posing questions that you may not actually ask in terms of being able to capture our current state. So I used business canvass model to capture current state. And that was the first time I'd actually really used one of those, and I did it,

actually changed some of the questions that the actual model posed, just to kind of tailor it a little bit more to the L&D space.

And then I used three horizons model to create the actual strategy itself. So what I really liked about that was that it breaks a longer period of time down into three horizons and it really enables you to do the aspirational thinking. But it can mix the kind of current state with that future so it's not just all about a blue sky future and no sense of actually ... where are we now, how are we actually going to get there.

So we looked at the third horizon first. I, as I said before, do a lot of research and reading myself to keep up to date, and I'm involved in different communities which I love and really enjoy. So I brought a lot of that thinking into the mix for the aspirational horizon, and I've got people in my team that do the same thing. So everyone fit into what we actually saw that third horizon looking like.

And then we went to the first horizon where we look at what we can do in the shorter term, but it's taking a small step towards that future direction. And then the transitional horizon, which is the second horizon, is really the period where you affect the most change in terms of moving towards that aspirational state.

So it's really interesting, capturing all the thoughts and ideas within those three horizons. And the big challenge is synthesizing and distilling all of that down to something that was digestible and understandable. So, did this through a series of smaller working groups and really kind of refining, sending out for review, refining some more. And out of that came the three common themes that kind of threaded through all three of the horizons, and so they've become our themes of culture experience and value. And so the way we've represented that and the strategy, the intent of it was to be able to show the evolution under those three things over those periods of time.

So yeah. And as I said, as we formed it more, we did start to socialize it a little bit more, in terms of the conversations we were already having with some of our stakeholders.

Michelle Ockers: Let's talk about your incredible tagline. I love this. "Freedom to Learn". How did you come up with the phrase, and what were you trying to communicate with that phrase?

Kate Jarvis: Thank you. We do love the phrase as well, and I have to say, it does seem to resonate with everyone. And I have to give kudos to one of my team members, Ned Hopkins, who actually came up with that title. He did a lot of the work to help to sort of frame and consolidate some of the information we gathered and the thinking, and he actually also designed the strategy document.

The idea or the intent of it is that that it creates a sense that learning is free spirited. That it's about anytime, anywhere, and in a way that works for the individual, and that it's a liberating thing. So yeah, we wanted to create the

sense of something that's freeing and liberating and empowering versus structured and kind of disengaging.

Michelle Ockers: I think it is very evocative and it immediately gives people permission and empowerment, as we say. I think it's beautiful. Well done.

Kate Jarvis: Great. Thank you.

Karen Moloney: So the strategy itself, we've kind of talked about the three horizons, so that current state, the transformational state, and the final state. Could you give us just an overview of just the sort of activities that would be included in each horizon? And then we might dig a bit more into the first one.

Kate Jarvis: Yes, certainly. So ultimately ... Yeah, as I said, it does span five years, and in a nutshell, it really is about taking us from being a training organisation to a learning organisation. So, horizon one, we're kind of just on the cusp of moving from horizon one to horizon two now. So we did a plan for horizon one around, what are the things we're actually going to do in this horizon that are going to be taking those steps forward. And we're just in the process now of starting to firm up the "what" around what we're doing for this next couple of years. So the middle horizon's around two years, and what sort of things we're going to be focusing on and putting our energies into the horizon two.

So we didn't want to do ... Well, I didn't choose to do a long-term plan of what we're going to do, because as we know, things are shifting and changing all the time, there's new things emerging. So I wanted to do the planning as we were rolling so that we're making sure we are actually putting our efforts into the right things and the things that are going to have most impact.

Karen Moloney: And responding to what's going on and the feedback that you're getting and the things that are working and not working as you move through each phase?

Kate Jarvis: Yep, definitely.

Karen Moloney: So if you're moving into horizon two ... Then, if we focus on horizon one for a bit then, and just talk to us for a bit about like, maybe give us three things that you've done as part of that phase, just give us a sense of what it looks like.

Kate Jarvis: Yeah, definitely. So there are kind of key things that we focused on for horizon one was starting to introduce some external digital learning content into the mix, to start to kind of enable that continuous learning as part of the workflow. And having options for people to kind of reach out for what they need and when they need it, and options to support people's longer term development as well.

So that was one thing, so that has been obviously a big focus for us and we've put quite a bit of capacity into that. We're just piloting it at this stage

with one part of the business, but we've got a broader, a longer term plan around rolling it out across the organisation. And a big part of that has been just that whole thing of people recognizing or learning how to learn in that way. When, in our organisation there has been quite a mindset around, if I need to learn or to support my development, I need to put myself into a course in three months' time. And so sort of seeing the value of accessing different types of learning in their different ways.

Karen Moloney: I think as well, it's the shift in accountability, isn't it? Because before, like you're saying, it was like a ... let's put myself in a course with somebody else. Like, I can't learn that thing until somebody else is ready to give it to me. Whereas this is more, okay, well I have a need, and I can go and service that need for myself.

Kate Jarvis: Yes. Absolutely. That's a great segue actually, because the other big focus we've had is actually having really good conversations with the leaders and individuals in the business to actually help them be more self-directed in their learning, but also help leaders work with their people in that way and help leaders coach their people to empower and help them to actually do that. So that, it's slowly starting to open up the thinking really and open up the minds to the role of the leader and also the importance of the leader in those conversations.

The other focus we've had is building or starting to build the foundations of what we're calling a learning network. So essentially, it's recognizing that there is a number of people in the organisation involved in either designing or developing and delivering learning in different ways, shapes, or forms. And certainly we've been partnering more with people in the business to actually do that. But it's actually around helping to build the capability in those people so that we've actually, we've got an extension, we're not just a centralised function. So that, as we're evolving as a learning organisation, we've got people in the business that are actually really key incredible parts to that and that we're actually supporting them to do that and do that well. And ultimately they become influencers and advocates as well, so they can help to be sowing the same seeds and then watering those seeds. So yeah, we've had quite a focus on that and a lot of enthusiasm from the group of people that we've been working with at this point.

And the third thing we have done is introduce ... Because part of the strategy is around demonstrating value, and so, we've introduced the Kirkpatrick evaluation concepts into what we're doing and that's been really exciting. So part of that's been building capability in my team to do that thinking and the application of it, and it's been really exciting to see that evolving. And we're using it in quite flexible ways as well, rather than being really prescribed. But we're starting to see some really great examples of where we're gathering data that actually supports that story of success and the impact that learning is having on business performance.

Karen Moloney: So that sounds really exciting, but those three initiatives, those key initiatives are probably more ... They're new things for the organisation. I know you've been working on doing some small things differently in your

existing programs to kind of just help move some of those so we're not just, kind of out the old in with the new. It's about integration as well. So can you just talk about some of the small things you're doing differently with your programs?

Kate Jarvis: One of our foundation learning programs in a particular part of the business, again, traditionally, have been really heavily classroom based and very much delivered by people in my team. So in that site, we've actually partnered with the leaders and a very supportive manager of that area as well to explore how can we ... Because what we were finding was that the people were overwhelmed with a whole lot of information, but then, by the time they actually got out to do their job, they needed so much support and almost a whole lot of extra training because there was just low engagement and some lack of relevance I guess to what they were learning. And it was just that whole problem of filling people's heads with a whole lot of stuff and then expecting them, five weeks later, to go out and apply it.

So yeah, we had some really open minds that actually worked with us in different ways. I think it was a five week program and we're now down to two and a half weeks. But of that two and a half weeks, it's not all teaching. So yeah, we've broken down to more bite-sized, digestible portions, and we actually share the delivery with people from the business, from that business. So the people who are actually doing the job and have that ... They've got all the stories that they can share from their client interactions, they know what happens day to day. So we've supported them to do some of the delivery.

And what we're seeing in terms of results is that the manager of that site is so excited because their speed to proficiency is so much greater, they're achieving much greater results as soon as they actually start to do their work. And they've kind of set a new benchmark in that site in terms of what's possible. So he's actually seen a lift in performance overall in the site as a result of it. So that's just chunking it down, delivering it in more engaging ways and creating more opportunity for the social side of the learning within that environment as well.

Kate Jarvis: And it's created. A bit of a ripple effect. Because others in the business have heard about this. As I've said, the manager's really vocal about the success of it. So that's actually paved the way to open up the opportunity to work in different ways with other parts of the organisation as well.

Karen Moloney: Okay. And you touched briefly on taking a soft launch approach to introducing the strategy into the business. I know there were a few reasons why you did that. Can you just talk to us a bit more about what prompted you to decide to take that soft launch approach and how you actually went about it?

Kate Jarvis: Yeah. Partly ... One part of me actually wanted to go out with flashing lights, you know.

Karen Moloney: Like, "Hey everyone! Here it is everybody!"

Kate Jarvis: That's right, yeah. But because I had, by that stage sort of been in the organisation for long enough to sort of get up a greater sense for the culture and the feel of the place, and from a timing perspective, it just wasn't quite right to do that. We just had new senior leadership come in to our HR space. She was just sort of getting her feet under the table and getting a feel for everything. And so, it just sort of wasn't the right thing to do from that perspective.

We felt that actually if we take a slightly softer launch approach to this and we understand the stakeholders who are probably open to some different ways of thinking ... Let's actually start to work with people. And the things that we were already doing with them anyway and start to incorporate this conversation into those existing conversations.

And it's been really helpful to actually be able to have kind of something that we can point to and talk about to help people understand the why behind trying something in a different way. And that the default doesn't always have to be a classroom based training approach.

So yeah, it was for a few of those different reasons really. I think, what the organisation was ready for, and also where we're at in terms of our people and culture group strategy and leadership, really.

Kate Jarvis: I think one of the drawbacks though, and something I've raised with my manager recently ... is that if the executive and senior leaders aren't actually onboard and reinforcing and helping to influence and drive change from the top, it can be really challenging to actually affect the change at the other levels of conversation. I think now is the time, we need to get in front of the executive leadership team and start to actually socialise and help them understand the why and the benefits and the value to this future direction and different way of thinking around learning.

So yeah. And she totally gets that, which is great. So I think we will get our

Karen Moloney: So thinking about your team now ... So we've looked at the culture side of things and the outside business almost is one aspect of bringing that change in. But your team had to deal with a shifting mindset about what learning is and how to do it differently. But then also follow that through. So there's kind of an added layer there of complexity in terms of developing their own skill set. So it's a big ask to walk into an existing team and basically shake up everything that they've always done. How did you take them on this journey to shift their mind set and develop a new skill set in line with that strategy?

Kate Jarvis: Because there was such a desire for a different future, they were really onboard with participating in and really embracing the future direction, or the development of it, and the actual vision itself. There is a real collective optimism around the fact that we actually are going to achieve this. So that's a great start, that's a fantastic starting point. I do have quite a variety of ... I guess people that have come from a real variety of backgrounds into the team now. So because of that, there's different levels of experience, definitely levels of thinking and different levels of capability.



And so, for some, it's been probably harder to actually kind of grasp what is it actually going to mean for us as we know that things are changing and going to continue to change. But how do we know ... What is a day in the life, in the future look like? And how do I know that I'm actually going to be able to do that, or do what needs to be done?

And so, yeah, I have done a bit of work with team over this last year around helping to kind of paint that picture of new capability and what that looks like. And I'm actually just embarking now on the journey of using the LPI capability mapping to create a lot more clarity for both the team and individuals in terms of what that future capability is and where we're at now and how we can actually then really create some meaningful development plans to progress towards that future vision. So they're really excited about that.

They do a lot of learning by doing. So learning by doing some things differently. My people on my team who do have a different level of experience are great in terms of mentoring and coaching the people in the team who are not quite so far along that journey.

Karen Moloney: I know that you drew upon your network to help with some of that as well. What did you do with them?

Kate Jarvis: I've had the opportunity to be part of Working out Loud circle, which I've found really helpful in terms of, during the development of the strategy and thinking about the capability within my team as part of that.

But one of the things I did do was actually connect some people on my team with others outside of the organisation that had been on a similar journey, but were actually a little bit further ahead.

So that was really powerful in terms of, I guess, using my own networks to help my team create their networks, as well. And I do a lot of sharing with my team from the conversations I'm part of, the things that I'm learning about in my own reading and research.

Michelle Ockers: How do you do that, Kate? Is that sort of something that's kind of continuous? Do you have specific sessions where you share what you're dedicated to learning, sharing ... How does that happen?

Kate Jarvis: Yeah, differently. So I do it a little bit informally. So I will something just share a link with someone and some points of interest or kind of things to consider in relation to it. But in my team meetings, we do have on the ... like, in the agenda every time as a sharing section. So the idea of that is that people are sharing what they're actually finding, what are they actually learning in the course of their week. Not necessarily by reading or research, but just by what they're doing, what's the key learning ... So we have a session in our team meeting that is devoted to that. And also a session which is around celebrating, which I think is really important as well to ... because it's so encouraging to be celebrating the small steps forward and the small wins that we're achieving as part of that.

So yep, very much, sharing is something I encourage and foster within the team. And the team love doing it as well, which is great.

Karen Moloney: Thinking about the wins actually, that was going to be my next question for you ... Which is, now that you're into that horizon one and moving into the next phase, what have been a couple of your key wins from that phase?

Kate Jarvis: A couple of key wins would be definitely starting to see some shifting in thinking in some of our key stakeholders within the business around how they're actually thinking about the needs, either for themselves or within the team. And thinking more broadly about what are the options. And they're actually seeking our advice more to help them do that. So that's been a real win because prior to that it was very much ... we felt like order-takers. That a request for training would come through and we'd need to execute it.

So now we're starting to see people thinking a little bit differently for themselves and seeking advice and input as well, which has been fantastic. The introduction of the LinkedIn Learning and the business groups that we're working with to pilot that has been a great one, because it's a really great example of the importance of having the leaders actually leading and driving something, versus it being something that's done to them and their people. So my team, who've been working on that project have done a fantastic around really engaging with the leaders, really making them feel like partners in the whole process and really just taking some great ownership around it, in terms of leading the conversations with their people as we're starting to roll out. So that's been a great win, and we start to see that filtering out into other pockets of the organisation as well.

Karen Moloney: A big focus of our podcast is being practical, because we want people to try new things. So we're not just about talking about things on here. We want people to take some information from this and go away and have a go at something new. So if anybody listening is keen to do more with creating or updating their organisational learning strategy, what would be your key takeaway tips to help them get started?

Kate Jarvis: A key tip which is something that I would do differently if I was to do this again, is actually do a more formal kind of current state analysis. And something I'm actually doing with my team now is using the Towards Maturity Health Check to kind of check and validate, I guess, our thinking around the organisational learning culture is what it is. So I would actually recommend using something like that and seeking some advice and support around doing that, if needed.

But other than that I think just ... And I think I said this to Michelle the other day. I think just do it. Give it a go. Like with the strategies that I have had the opportunity to lead the development of, this one I did completely differently and I hadn't used the models before, but I just did the research and I just gave it a go basically, with some structure and obviously some thought and

planning around it. But it's been ... I think it's such an important thing to have for the organisation and for the team that I think you can't afford to not do it. So that would be my recommendation, is to gather what you need to do to be able to do that. And that's going to look probably different for each organisation and different people.

Michelle Ockers: Thanks Kate. I think they're great tips. Very clear. We have one final question we'd like to ask all of our guests, but I feel like you've danced around this question right throughout the whole conversation. And that's about your own professional development, the biggest thing you do for your own professional development. So how would you sum that up?

Kate Jarvis: Definitely curiosity and actually doing something with that curiosity is the biggest thing that I have done for my own professional development. So I am constantly, I have a real interest in looking outside of my own world and our own organisation and even New Zealand. So I have a real desire to do that, so that's what I do. I just go and I find ... Sometimes people recommend things to me, sometimes I'm just looking and I find really interesting websites or blogs.

So there's certain things I gravitate back to, but I'm constantly searching, researching, reading and kind of formulating my thinking as a result of those things. I do do some formal learning myself as well, but not necessarily specifically in the L&D space. I've just done a coaching accreditation. I'm doing my MBA at the moment. So yeah, I do do a mixture of things.

Michelle Ockers: You are high energy, Kate. There's no doubt about it. You're dealing in lots of things. Very active. So we're going to include a link to your LinkedIn profile with the show notes, plus as you've mentioned, a whole stack of resources throughout the discussion that we'll include in the show notes. Encourage people to actually take a look at the strategy to get familiar with the structure, the content, just the whole way it's been presented. It's really worth taking a look at.

So thank you so much, Kate, for sharing your work and your insights with us.

Kate Jarvis: Thank you so much. It really has been a privilege, yeah. So thank you.

Michelle Ockers: And to our listeners, if you're finding Learning Uncut valuable, can you please take a moment to rate and review the podcast. It helps to make it more visible to others so others can get the same benefits that you're getting out of listening to us. Thank you.

Kate Jarvis: Thank you.