

# Engaging SMEs in an e-Learning Programme

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## ABSTRACT

This paper presents the findings from a project investigating management development for SME managers using an action learning programme, combining both face-to-face workshops and e-learning. This programme was undertaken as part of ENSeL (Engaging Networks for Sustainable eLearning), which was supported by the European Commission. The project aimed to address 3 main objectives: reworking results from previous European projects to disseminate to a wider audience, creating a learning network amongst the project partners and to undertake 3 learning trials with SMEs in UK, France and Italy. This paper principally addresses the findings from the UK trials, which ran between February and April 2005, and provides valuable learning to all those interested in developing future learning programmes aimed at SMEs.

## Keywords

elearning, management, development, programme, SME

## INTRODUCTION

### ENSeL Project Organisation

The ENSeL project, coordinated by Henley Management College (HMC), aimed to share the learning from five EU funded projects/networks all of which contained a core e-learning element. The projects being integrated included the **PeLM** project (Programmes in learning through e-learning for managers), **eLIVE** (eLearning and Knowledge Management for European SMEs), **ESeN** (European SME e-Learning Network), **ROCKET** (Roadmap to communicating knowledge essential for the industrial environment) and **EQUEL** (e-quality in e-learning, the EQUEL Virtual Centre of Excellence).

The initial project tasks culminated in a review of the e-learning frameworks emerging from EQUEL and the other represented EU projects. These were then formulated to make them suitable for European SMEs. These principles of e-learning for SMEs were drawn on prior project experience with SMEs and have been reviewed in light of the results of the ENSeL project. During the review, an approach to the SME trial design emerged that was similar to action learning (Revans, 1980), but also included a virtual environment. Action learning is certainly not a new development in the education of managers. Indeed some of the early approaches to management development (Wilmott, 1994) saw an emphasis on sharing experience and less on content. The Syndicate or 'Set' method was devised for this purpose with the rationale of helping managers to 'help themselves' via practical problem solving around real life issues. Some of the advantages of virtual action learning directly address the needs of SMEs: flexibility, cost benefits, location is not a barrier, freedom to work at own pace, less disruption to work schedules and an opportunity to shape the learning agenda or content.

Based on the characteristics of the target audience for the trial, namely SMEs, ENSeL has elaborated some learning principles to inform the use of sustainable networked learning in SMEs. These principles are grounded in the position papers about e-learning in Higher Education, which are the final output of the EQUEL project, and draw mostly on theories supporting social learning, socio-cultural approach to learning and social constructionism.

## ENSeL Learning Principles

The following principles informed the design of the SME trials at the beginning of the project. These were later revised in view of the findings, as discussed in the final section of this paper.

1. Our focus is on learning and learner-managed environments.
2. Learning is better supported in collaborative settings and dialogue plays a major part in the collaborative learning process.
3. Social interaction allows for co-construction of knowledge, which promotes engagement of learners in work based and problem-based learning.
4. The role of the facilitator/animator is essential for collaborative e-Learning.
5. Critical reflexivity is an important part of the learning process for evaluating and examining both the learning process itself and the resultant actions taken.
6. Learning is situated and context dependent.

The roadmap (Figure 2) for the design of the SME trial has been developed based on the reviewed e-learning principles/ frameworks and prior partner experience. The roadmap has now been tested with SMEs in 3 trials in the UK, Italy and France.

## LITERATURE REVIEW

### Learning in SMEs

Due to the immediate day-to-day pressures of running an enterprise, most learning within an SME is informal and experiential and takes place in the work environment. Much of the knowledge developed, often by the owner/manager (especially in the case of a smaller enterprise), remains tacit and unshared. This implies different requirements must be placed on training. Formal training is perhaps not the best way of learning for SMEs (Atwell, 2003) and much existing training is supply-led and fails to meet the needs of SMEs, is too generic with too little emphasis on specific business concerns, and has inappropriate modes of delivery (Bolden, 2001). Therefore, training within an SME is often assigned a low priority and regarded as an expense rather than an investment (Blackburn and Hankinson, 1989), in terms of both time and money.

The isolation of the enterprise owner/manager is also a barrier to learning. They are probably the only person within the company concerned with strategic decision-making, however, *“enmeshed in the practicalities of running their businesses, these chief executives may have lost any interest they may once have had in theoretical issues”* (Inglis, 1994). Yet, it is precisely the competencies of the owner/manager which directly impact on the survival and success of an enterprise. These and other obstacles to learning place certain requirements on any learning programme for SMEs, as summarised in Figure 1 (Birchall, Hender & Alexander, 2004)

<b>Obstacles to Learning</b>	<b>Programme Requirements</b>
The reluctance of SME leaders to participate in formal development programmes (Bolden, 2001).	The programme should be informal and work-based (Bolden, 2001).
The isolation of the chief executive (Inglis, 1994). The neglect of the development of team-working skills (Inglis, 1994).	An informal environment should be built to aid networking. The network should provide a forum for exploring ideas with peers, and give support to individuals.
Many SME leaders have considerable company-based knowledge but limited experience of broader management competences (Bolden, 2001).	The SME leader must be motivated to participate through recognition and use of their existing skills and experience (Bolden, 2001).
Enmeshed in the practicalities of running their businesses, SME leaders have lost any interest	The programme should have a strong practical basis, and providers must be perceived as credible and experienced

they may once have had in theoretical issues (Inglis, 1994).	i.e. they should, perhaps, be older, with considerable practical experience outside academia (Bolden, 2001).
The primary concern within SMEs is keeping the company running on a day-to-day basis (Bolden, 2001).	The programme should support the SME's everyday operations. The SME should see benefit to their everyday business processes.
Financial costs (Bolden, 2001).	The programme should have a measurable impact within the organisation (Bolden, 2001).
SMEs are time poor.	The programme should be flexible (Bolden, 2001).
The SME leader's own negative attitude to change (Observatory of European SMEs 2003, No.1 'Competence Development in SMEs').	When individuals are involved in the learning process dealing with issues of relevance to their careers they become motivated learners (Bray, 2002).

Figure 1: Obstacles to Learning and Programme Requirements.

### Action Learning

Andragogy is the theory of adult learning proposed by Knowles (1970), who defined andragogy as the "art and science of helping adults learn". One of the major concepts behind andragogy relates to the need to learn for achieving a specific task or solve a real life problem, and that full participation through active contribution to learning experience is most beneficial to adult learning. "*In an adult class the student's experience counts for as much as the teacher's knowledge*" (Knowles, 1984).

Taking into account recent theories on situated learning and the programme requirements outlined in Figure 2, a learning approach based on Revans' work on action learning (Revans, 1980) is likely to be the most appropriate for SME owner/managers. Action learning is pedagogy associated with the philosophical principles of work based learning (Bray, 2002). "*Action learning is a method for individual and organisational development. Working in small groups, people tackle important issues or problems and learn from their attempts to change things*" (Pedler, Brook and Burgoyne, 2003). There are four elements:

1. Each person joins in and takes part voluntarily.
2. Each participant must own a managerial or organisational problem on which they want to act.
3. Sets or groups of action learners meet to help each other think through the issues and create options.
4. They take action and learn from the effects of that action (Pedler *et al.*, 2003).

There are a number of requirements for action learning: the set, the project, the set adviser, set meetings, and workshops.

### E-learning in SMEs

Although action learning addresses many of the requirements of learning programmes for SMEs, it may be that a combination of e-learning and action learning may be even better. Some of the advantages of e-learning directly address the needs of SMEs: flexibility, cost benefits, location is not a barrier, freedom to work at own pace, less disruption to work schedules. However, there are some disadvantages, such as self-discipline, loneliness, and dealing with large quantities of electronic materials. When adapting an action learning programme to e-learning, Bray (2002) warns that the pedagogic baggage that both tutors and associates carry is clearly a barrier that needs to be overcome, as is developing different interpersonal tools of communication and style. Ingram *et al.* (2000) also warn that care must be taken with both hard (hardware, software, administration, financial support) and soft (human relationships, communication, goodwill) critical success factors. This has implications for the set members, set meetings and workshops, resources, and the set adviser.

### Networked Management Learning

Hodgson and Watland (2004) defined networked management learning as learning that is supported by ICT used to connect learners with other people (learners, tutors, mentors, etc.) and to learning resources and information of various kinds. Network technology offers the opportunity, through the use of computer-mediated

communication and/or via the internet, to catalyze, strengthen and connect SMEs in order to build and enhance networks of business at the regional, national, or international level. Among the other aims, technology holds the potential to connect individuals/groups/organizations to resources they need for their work activities; to create a sense of community where people can share knowledge but preserve diversity; to organize events that bring business and other institutional actors to support a collaborative and cooperative approach to learning. The ENSEL project can be most closely defined as a trial in networked management learning.

## METHODOLOGY

### The Research Design

The design of the research can be considered as a case study or three individual case studies, if dealing with one trial at a time. This was an empirical investigation aimed at understanding the different ways in which SME managers described their experience of networked management learning. The purpose of the study was not testing hypotheses but exploring what participants thought and felt about their participation in the trials by asking questions that led them to relate their experiences and explore their attitudes to networked management learning. Qualitative data was collected using registration forms, one-to-one interviews, focus groups and facilitated face-to-face workshops, in addition to questionnaires. Quantitative data was collected using participant questionnaires, completed at the beginning and the end of the trial.

### Participants

The trial included a total of 56 SMEs in UK, France and Italy. The 29 UK trial participants included healthcare professionals, financial services managers, IT and telecom consultants, manufacturing and engineering company owners and managers, recycling business managers, providers of educational services, music publishers, website developers and suppliers of social and leisure services. The trial in France recruited 14 participants, principally working as consultants with a background in e-development and innovation in the IT sector. The trial in Italy recruited 13 SMEs, many related to providing services to the healthcare sector.

### The Trial Design

It is notoriously difficult to persuade SMEs to invest their time in learning and development programmes (Bolden, 2001) and therefore it was essential to create a clear business proposition. The programme was called “Managing SMEs in the 21st Century” and offered the participants the opportunity to investigate and find solutions to their current business problems, using a practical action learning programme.

The trial was designed as a blend of face-to-face and online activities, coordinated by facilitators, as shown in the ENSEL Roadmap (Figure 2). The trial design aimed at moving away from traditional pedagogical and didactical approaches by allowing participants to learn through the group process. Throughout the trial, the participants were encouraged to keep track of their learning and to develop their capacity for reflection.

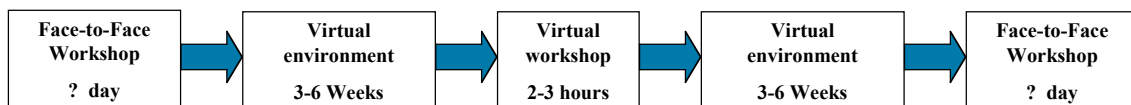


Figure 2: Roadmap of the SME trial design

### Recruitment of SMEs

The recruitment activities started almost 6 weeks before the trial start date. In the light of previous experience working with SMEs, it was essential to target companies that were innovative and entrepreneurial. Previous trials had suffered from an excess of stable, small businesses such as local shops, who had very little interest in learning programmes and preferred to use them purely as selling opportunities. In order to generate interest in participation in the trial, it was essential to provide the SMEs with a clear business proposition. This was stated in the initial promotional material as :

- An opportunity to address current business challenges
- An opportunity to share experiences and network with other leaders and managers
- Access to resources (people, e-library, tools etc)

- Small time-commitment (2 hours per week)
- Flexible approach – e-learning at your own convenience

Prior research (Stewart, 2004) had identified some current challenges for SMEs and these were included as suggested themes for the action learning sets in the promotional materials. These topics were Strategic Planning, Leadership Development, Leading and Managing Change, Developing an International Market and Managing Strategic Growth. The participants were also invited to nominate other themes that they were interested in developing. In this way, the trial was intended to directly address current SME needs. Once recruited, the SME managers were grouped into action learning sets putting people together from similar industry sectors, in groups of between 5 and 8. This intensive and thorough process resulted in recruiting SMEs, where 46% were going through a period of growth and 30% were new start-up companies.

### **Trial Preparation**

Once the SMEs were recruited, the lead facilitators prepared for the trial as follows:

- Participants were pre-assigned into groups on the basis of their business sector groupings.
- Each group was allocated one facilitator, who facilitated both the face-to-face and e-learning activities.
- Training sessions were designed to demonstrate the e-learning environment and the e-Library.
- The programme activities and group tasks were designed and presentations prepared

The decision to group people into sectors has advantages and disadvantages. The main advantages are that similar sectors face broadly similar issues and are able to share their problems with people who have an understanding of their business environment. For example many of the services companies had prior experience of delivering training programmes to large IT companies and could share this with each other. One of the principle disadvantages of having participants from similar sectors is the threat of exposing themselves to potential competitors, suppliers or customers and revealing information that they prefer to keep private. In this trial there were no participants that considered themselves in direct competition with other people in the group.

The facilitators were selected and allocated to groups based on their prior experience of facilitation and their knowledge of the sector they were facilitating, to avoid the potential disadvantage of needing to explain basic business details to the facilitator.

### **The Initial Workshop**

The first workshop was successful in many ways. The groups worked well together and there was very positive feedback on the action learning approach. The groups identified their challenges and started in different ways to agree their approach to the interim working using e-learning. The time spent on coffee breaks and lunch involved much sharing of experiences between the group members, generally described as ‘feeling that they were not alone with their problems – there were others in the same boat’. Informally they offered help and suggestions to each other.

However, there were some aspects of the workshop that did not go as well as expected. For many, there was a lot covered in one morning, and the pace was too fast. Secondly the technology was not available for the training session and the short demonstration given was not sufficient to give the participants any confidence in being able to use the e-learning platform after the workshop. Finally the participants were not all comfortable with the vague nature of the task. This was particularly evident amongst the more traditional industry groups, who really wanted clear tasks, explicit delivered course content and a precise structure to their learning programme. This was least evident amongst the group of entrepreneurs, who quickly grasped the idea of defining tasks, allocating work amongst the group members and appointing one group member as co-ordinator.

### **The E-learning Phase**

Following the initial workshop, the groups were registered for the discussion forum and expected to continue their group activities on-line. However there were significant technical problems that meant that this could not happen. Different groups resolved these technical problems, in different ways. One group decided to abandon the discussion forum within the first week and communicated entirely by email. This group had also appointed a co-ordinator and went on to collaborate very successfully. Another group moved onto a very structured tool based approach where they worked individually on a one-to-one basis with the facilitator. The other groups persevered longer with trying to use the discussion forum, but unsuccessfully. This led to a complete lack of

collaboration between the group members. This was one of the reasons that caused the interim workshop in the UK to be changed to allow a face-to-face session, as well as on-line presentations. Email communication was continued throughout the trial, but as discussed, only one group worked collaboratively and the other groups worked on individual tasks as guided by their facilitator.

### The Interim Workshop

The primary deliverable was intended to be a presentation of the group’s activities and results from the first half of the trial and these presentations were to be reviewed by the other groups. All the presentations were published in the discussion forum and sent by email. A small group of UK participants met face-to-face for an afternoon and the presentations were reviewed constructively during the session. The French SMEs adopted ‘Skype’ for their interim workshop to supplement the discussion forum. The groups also raised the issue of needing more structure to the learning programme, and this resulted in the UK group generating (in the face-to-face session) a diagnostic tool, which they then worked through on a step-by-step week-by-week basis. They also decided to include their individual learning reflections with the weekly summaries.

### The Final Workshop

This event was scheduled as a morning and lunch session, as discussed earlier. The groups’ task was to present their summaries of challenges, activities and action plans to each other and then summarise to the other groups in the plenary session. They spent almost the whole morning working in their learning sets, with only about one hour in large group presentation and discussion. The groups spent a significant amount of this time considering their reflections on the programme and their learning.

## SUMMARY OF RESULTS

### SME Perspectives of the Trial

The participants recorded their experiences in groups and individually on the post-trial questionnaires. Analysis of the questionnaires resulted in 73% stating that they had met at least some of their objectives, and 67% stating that they would be able to apply their learning in their personal and professional life within 12 months. There were 90% of participants who agreed that it had been useful to share with others and 77% felt that they had become more effective managers. It was interesting to note that whilst there was a poor response to questions about the on-line collaboration area, 73% of participants found the help of the facilitators very useful. Some of the SME comments are summarised below:

	SME Comments
What was successful?	<p>Very enjoyable and useful face-to-face sessions</p> <p>Encouraged further thinking on management issues</p> <p>Personal (one-to-one) discussions over drinks / lunch</p> <p>Structured tools and templates very helpful, especially the Challenge Diagnostic</p> <p>Focused on similar-size businesses (most less than 20 employees)</p> <p>Facilitators helped to push it along during the e-learning phase</p> <p>Subject and focus was just right</p> <p>Access to facilitators and group members by email</p> <p>Face-to-face sessions preferred, maybe due to ‘age’ of participants (felt e-learning may be more easily adopted by younger people)</p> <p>Liked being with similar sector / size / type of organisation</p> <p>Have identified possible reciprocal business opportunities</p> <p>Collaborative aspect was great</p>

	<p>Learning from others was very worthwhile</p> <p>Realising shared issues (it can be lonely as an SME)</p> <p>Generation of insights</p> <p>Access to resources (e-Library) was valuable</p> <p>Really helped to reality check the business and re-focus on the basics and essential of business</p> <p>Realised that interpersonal development was more important than academic learning</p>
What was NOT so successful?	<p>Technology was very slow and not intuitive</p> <p>Lack of collaboration following face-to-face sessions</p> <p>Wanted more structure and direct content (some) in the programme</p> <p>Disappointed in the lack of commitment of other members of the group</p> <p>Difficult to schedule time for e-learning and give up if it doesn't work easily and quickly</p>
Recommendations for Future	<p>Clearer structure at the beginning and more tasks with deadlines</p> <p>More face-to-face sessions</p> <p>More time spent bonding as a team, rather than group</p> <p>Get the right e-learning platform (fast, intuitive, simple)</p>

### Facilitators' Perspectives

Following the trial, the facilitators held a small workshop to review the trial and produced the following reflections. In view of the comments from the SMEs, identical comments are not reiterated here, and only additional comments and observations are included. The trial facilitators agreed the following:

- The face-to-face workshops were the most successful, especially the last one
- The initial workshop, marketing information and programme should have contained more detailed information on the objectives, structure and expectations of the trial
- Successful collaboration was also supported by informal communication such as telephone conversations, one-to-one emails and meetings in pubs etc.
- The topics proposed addressed the SMEs interests
- The sector mix in the groups worked well
- The scheduling of face-to-face events at about every 4 to 5 weeks was about right

In summary, the facilitators considered that there are constant opposing challenges to running such programmes, such as structure, timing, numbers of participants, and technology. The participants expect clear objectives, tasks and outcomes to varying degrees depending on their preferred personality type and learning style. Some want a lot of detail, and others will require only high-level information. Too much detail can be restrictive and too little creates uncertainty. The group size of between 4 and 8 people is good for action learning sets, whereas a larger number, over 30 is better to create lively discussion groups. It was essential to build trust between the participants themselves, as well as in the programme providers.

### CONCLUSIONS AND IMPLICATIONS FOR FURTHER RESEARCH

The overall conclusion of this study is that it is possible to successfully engage SMEs by using an engagement strategy that communicates in terms of meeting by SME needs and addressing their current business problems. The combination of face-to-face activities and action learning worked well on this project, and helped to encourage the SMEs to join the programme. The need for a clear structure to the programme was

underestimated and in the future more attention should be given to informing potential participants of the structure, tasks and the expectations of their involvement.

The facilitation of the trial was successful in many aspects, however, possibly due to the technical issues; this role took a significant amount more time and effort than expected. There was a need for facilitators to be in communication almost on a daily basis and use a flexible style to motivate the participants. There were times when a 'light touch' of facilitation was sufficient and also times when the participants looked for clear directions and guidance. In light of these experiences and following a careful reflection of the findings, the ENSEL project partners revised the initial 6 learning principles to the following:

- Our focus is on learning which has a perceived value to the learners
- Responsibility for the learning process is shared (between all actors in this process)
- Learning is situated and context-dependent
- Time has to be allowed to build relationships
- Learning is better supported in collaborative settings and dialogue plays a major part in the collaborative learning process
- Social interaction allows for co-construction of knowledge, which promotes engagement of learners in work-based or problem-based learning
- The role of the facilitator / animator is essential for collaborative elearning
- Critical reflexivity is an important part of the learning process for evaluating and examining both the learning process itself and the resultant actions taken.

### **Implications**

This study raised several interesting points for further research. Firstly, there was a tendency by both participants and facilitators to blame many of the problems with collaboration on the technology problems. It would be valuable to investigate how much this masked other issues about using a collaborative e-learning approach. Some of the participants expressed the view that their lack of collaboration and motivation in using e-learning was down to their age (average in 40s) and stated that a younger generation brought up with the internet and web-based learning at schools and colleges would be more accepting of e-learning. The findings of these trials indicate the possible model, below:



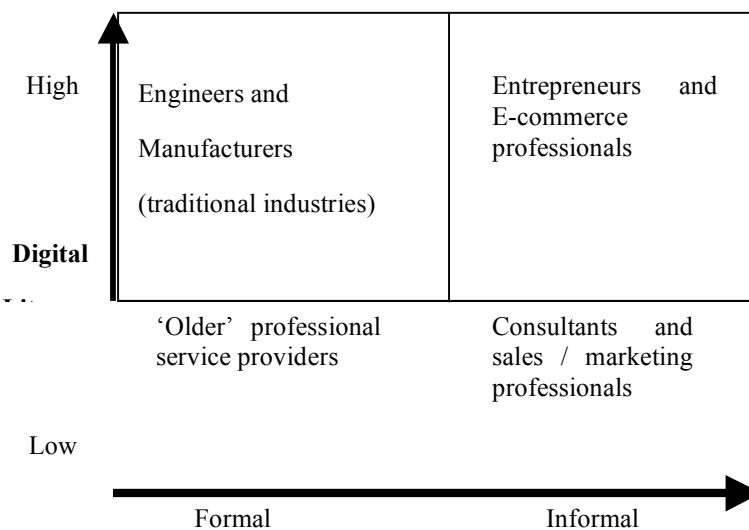


Figure 3: Structure / Digital Literacy Matrix

The above model attempts to illustrate that those with a higher digital literacy and greater acceptance of the more informal work-based learning tended to come from businesses of entrepreneurs, with innovative new products and services, often exploiting new technology. Many of these were providing complex information technology products and offering unique web-based services.

Those with a higher digital literacy that preferred the more traditional formal type of programme, tended to be from the more traditional industries and were often initially educated in engineering and science based disciplines. For many of these, this was their first experience of an informal learning programme. Whilst the majority of the participants realised benefits at the end of the programme, they tended to be very suspicious of a programme with a facilitator, rather than a teacher. The participants with lower digital literacy were very reluctant to use technology. The requirements for participants attending the ENSEL programme had been stated as they needed to be able to use email and access the internet. There was one example of a participant who met these criteria, but his first email was written in the style of a very formal business letter. This indicated challenges in the attitude towards the technology, not just the technical skills of sending emails.

Those that were reluctant to use technology preferred both formal and informal structures. Some, who referred to themselves as an 'older' generation, stated that they had come from a tradition of formal, structured education at school and college, where you were taught to read books, learn facts and listen to the teacher. This group reflected that a younger generation brought up to question and challenge, research on the internet, complete on-line examinations, and use technology for study and leisure, would have more easily accepted the approach. The other group of people with low digital literacy but a preference for informal learning emphasised their satisfaction at the face-to-face events and appreciated the opportunity to discuss quite loosely-defined problems with the others in the group. Comments were made concerning trust, especially when there was the potential that the other members of the group might be competitors. This was particularly evident in the Italian trial, which resulted in a reluctance to collaborate and share knowledge, apart from at face-to-face events. This category of participants was particularly emphatic on the need to spend time getting to know the people in the group first.

The above model indicates the challenges in engaging SMEs for learning programmes and the need to provide programmes that either encompass all approaches or, alternatively, are targeted at a particular group. For those that fall into the category of lower digital literacy, this would need to be addressed, prior to engaging them in collaborative learning programmes supported with technology.

The type of challenges the SMEs worked on in this programme often involved revealing aspects of their businesses and personal effectiveness that they were comfortable to talk about in face-to-face events but were reluctant to submit to discussion forums. There needs to be a more in-depth investigation on to how to facilitate trust, collaboration and open communication in an e-learning environment. The constant tension between the

business pressures on SMEs to be totally dedicated to their companies and the benefits of taking time out for learning and reflection should be investigated further, to attempt to identify ways to allow the participants to develop trust and simultaneously does not involve them spending several days away from their business.

Overall, this project has made some interesting findings and provides valuable insights into developing effective management learning programmes for SMEs. This study has also indicated several challenges for future research and important practical issues to address, such as the low level of digital literacy in the SMEs involved in this programme. Despite the relatively small number of participants in the ENSEL trial programmes, the findings can be seen as making a significant contribution to this field of research.

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