

# **Getting Results from Action Learning: Lessons Learned from the Organizational Trenches**

## **Session TU114**

### **Presenters:**

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### Session Learning Objectives

By the end of this session, you will have (at the very least):

1. Evaluated the appropriate use of action learning projects for management and leadership development
2. Learned strategies for the design of effective action learning management development programs
3. Reflected on a real-life action learning case study and discussed lessons learned
4. Debated and conversed on best practices for action learning
5. Enjoyed yourself and learned something!

Our group has included action learning project components in its management development offerings for over five years. We are not alone: action learning is seeing more and more use as a “standard” feature of management or leadership development programs in organizations. We have had great successes, abysmal failures, and everything in-between.

Action learning is a risky way to do leadership and management development. It places tremendous responsibility on the learners to self-initiate, take personal chances, and perform in front of subordinates, peers, and executives. But with risk comes reward. Reginald Revans, the originator of the concept of action learning, argued that real-life problems pose the best conditions for the development of wisdom. Through shared problem-solving, and inquisitiveness, action learners gain insight into themselves, their environments, their colleagues, and the nature of the problems they must solve.

Action learning also brings the valuable side benefit of potentially generating *real* ideas for an organization. In fact, we recommend to our clients that if they want to implement action learning as a way of building managerial and leadership capacity in their organization, they ought to treat action learning projects as equal part “real” work and learning.

We believe action learning is most effective when aimed at the right spot and in our experience that spot is upper-middle management. The stretch challenges for an upper-middle manager are typically to become more intrapreneurial, build coalitions for innovation, champion ideas, and to learn to think strategically. Lower-middle management or line supervisors do not typically have the experience, power, or industry knowledge to create organizationally useful action learning projects. Senior leaders, on the other hand, have already demonstrated the ability to create value (hopefully!), and action learning may be too similar to the work they are called upon to do on a day-to-day basis.

The following list of principles summarizes some of the most important lessons-learned from our deployment of action learning projects with our organizational clients. We have conducted action learning at a wide variety of organizations, within many different industries. From our track record, we do find that successful action learning depends on a few critical orientations.

1. One size doesn't fit all

Each organization has a distinctive character, and climate for learning. While in principle action learning can be of benefit in any organization, the set up and definition of action

learning projects needs to be in line with organizational politics and culture. In a large not-for-profit government-regulated organization, for example, the purpose and potential impact of action learning projects is significantly different than it would be in a small, cutting-edge technology firm. The best approach for defining a good action learning experience with any organization is to ask: “in what domain does an action learner have the ability to innovate or to improve quality?” Unless an organization is so bureaucratic as to allow no room for local initiative, there will always be room for individuals and small teams to seek to improve service, propose new products or processes, or enable better work relationships or knowledge management.

## 2. Shoot for the moon

In our experience, action learning that is too cautious or too controlled does not yield good results – both in terms of learning outcomes and potential use of ideas generated by the action learners for their organizations. Many organizations use action learning as the focal point of management and leadership development programs, or as a supplement to more conventional programs. However, in many instances the projects are pre-determined and chosen by senior management. In some cases, this helps focus the action learning projects on strategically relevant topics. In many cases, however, this disengages the action learners from the process or too tightly circumscribes their creativity and playfulness in the process. One of the fundamental objectives of action learning is self-initiated curiosity, combined with self-directed problem-solving. We have had the best success with action learning projects when the learners are given some direction about *how* to choose a project, topic, and problem, but are left to themselves to select it. Furthermore, action learners like to feel a sense of play, and feel that they can tackle something of value. In our experience, it is far better to encourage action learners to propose audacious (yet well-reasoned) projects than overly conservative and bite-sized ideas.

## 3. Create some theater

There is a reason why people inject theater and ritual into social occasions. Organizational rites are extremely important ways to generate not only enthusiasm but a sense of opening, closure, or integration. Trice and Beyer discussed the power of organizational rites in their classic *Academy of Management Review* essay “Studying Organizational Cultures through Rites and Ceremonies” (1984). Public ritual and ceremony is a critical outlet for social groups – and hence organizations. It allows for public display of thankfulness, appreciation,

emotion, and disagreement. We have found that including ceremony for the opening and, especially, the close of an action learning experience greatly impacts the perceived value of the learning for all stakeholders. This “theater” can include photography, videography, or any other way to make the experience of the action learning more than simply a set of reports.

#### 4. Do them seriously or don't do them at all

The potential payoff, both in terms of individual learning and organizational gain, from action learning is significant. As with “Shoot for the Moon”, it is important that the organization and project sponsors treat the action learning projects as “real” work, and not just as an assignment imposed by some outside training program. Organizations that explicitly communicate to employees that action learning projects are part of an employee's normal work will find that learners take them seriously. When action learners feel unsupported or if they feel as if their managers do not value the action learning process, they will shortchange the action learning process by not taking it seriously and withdrawing. Particularly in dynamic, fast-paced organizations, action learning that is unsupported can backfire quickly and sour participants on the process. It is critical to build a strong climate for acceptance and encouragement among the participants.

#### 5. Coach the sponsoring stakeholders too

We have found that an absolutely critical part of the action learning process is the last step – a formal presentation of action learning ideas/results to sponsoring stakeholders. Presentation to the executive is commonplace with action learning programs. We have also found the usefulness and impact of this last step in the process depends on the conditions by which the stakeholders interact with the action learners. Without direct coaching, an executive team may often view action learning projects as simply a by-product of “training” and feel obliged to listen, smile, and then dismiss and forget about the projects. This can be incredibly disheartening for action learners as it sends a clear message that the action learning was simply an “exercise”. Action learning is often a good way to build vertical engagement in an organization, and bridge gaps between layers of management. Ironically, we have been witness to situations where a lack of real response from executive to strong action learning projects has led to resignations.

Good coaching requires communication to the executive (or the relevant stakeholders) about the purpose the action learning projects and expectations about their role in the process. At the end of this document are two examples of communication to executive teams in preparation for the closure of an action-learning based program.

#### 6. Be prepared for change

We tell our clients that introducing learning into an organization comes with risk. Learning, by definition, implies individual-level change. Group learning fosters organizational change. We have seen many examples of “successful” learning interventions that create turmoil and dissatisfaction among participants. Particularly, if learners undergo important personal changes in a learning process but feel unsupported or undervalued by their organization, they can disengage. It is critical that sponsors for action learning in an organization plan for how to deal with the individual and organizational results of the learning outcomes.

#### 7. Reflection is the punchline

Reginald Revans proposed an equation that guides learning:  $L$  (learning) =  $P$  (programmed knowledge) +  $Q$  (questioning). At the time, this was quite a departure from the knowledge-centric model of traditional education commonplace in British higher education. We would add another equation to learning theory.  $Growth = (Challenge + Risk + Practice) \times Reflection$ . To foster growth, action learning projects must be suitably challenging. They must be something that stretches the skill and imagination of a learner. The learner must also be willing to take a risk. Fear can lead to conservatism and risk-avoidance, and in such situations the learner rarely gains much. The learner must have the occasion to practice and try out new behaviors. But the sum of these factors is multiplied, in our view, by reflection. For learning theorist Donald Schon, the key to growth for professional practice is the ability of the professional to have a continuous dialogue with himself or herself – to reflect-in-action. We strongly agree.

Any action learning experience, whether traditional action learning projects or simulation-based learning, must build in a structured method for encouraging reflection. Without this component, the process is a run to a finish-line and while it may be valuable “work” it is not a process that maximizes learning. We have found that the best way to encourage this reflection is to hold individual debrief sessions with the action learners, post-program, to fully



## *Sample Note to the Executive #1*

Greetings,

I've met a few of you before, and look forward to meeting all of you next week. I can speak on behalf of all of the instructional team in saying that we greatly enjoyed working with your high performers group and are proud of our association with your company. We have worked with many different firms, and we were all very impressed with the caliber and commitment of your managers in taking on this leadership development challenge.

I wanted to circulate a quick email to give you a sense of what, ideally, we are looking for from you during the project presentations. These presentations serve as the final portion of their management development program – a program that included day-long sessions on Leadership, Financial Operations, Systems Thinking, Team Process, and Strategy. We asked them to work in small groups on a business idea of their own design and to develop a small “case” around that idea. I understand that Teligence has a specific way of evaluating new internal business cases and we have encouraged them to make use of those processes when/if appropriate.

The project groups consist of individuals who do not normally interact on the job – by design, we wanted the participants to work with other individuals around the company and gain mutual appreciation and understanding for the variety of skills and backgrounds in the room. However, this has made the project assignment even more challenging as a group of managers have been forced to agree upon an idea and flesh out a business case for that idea.

You will be exposed to six very different ideas next week. The cases range from product/service cases that explore additional revenue streams from existing products, to internal process cases that aim to build better communications or infrastructure at the company, to strategic direction cases that look at opening entirely new markets. I would ask you to evaluate all these ideas using the same standards you would apply to “real” business ideas at the company ... with a few slight differences:

- Try to meet the teams and their ideas on their own “terms”; some teams may present relatively small and contained cases and some may shoot for bigger game – try not to compare teams simply on the basis of scope. Rather, evaluate each project on the basis of business reasoning, argumentation, presentation, and clarity. We have let the teams determine their own ideas. So meet them where they are.
- Remember that this is a development and learning exercise. I would encourage you to be critical yet open-minded. For example, “We'd never do that” isn't a very good response. The teams are out on limbs and some of them are exploring ideas quite far afield from expertise. Reward them with, at least, justification for why you have concerns or criticisms as opposed to dismissing an idea.

- Apply tough standards for justification. Be open-minded, but don't let bogus or seat-of-the-pants stuff off the hook. I've pushed the teams to make sure they are prepared. I give you free reign to criticize a team that appears not to have done its homework.
- Honor my time-keeping. Each team will present for maximum 20 minutes and have about 10 minutes for Q&A. I'm sure that you may have more than 10 minutes of questions, but in order to get all six teams done in the morning, I'll call time at 30 minutes per team. You'll have plenty of time to follow-up with them at the reception or back at work.
- Have some fun! It isn't every day that the participants – or even yourselves – get to do something like this in a structured way. Try to enjoy yourselves a bit.

Feel free to email me at [mark\\_frein@sfu.ca](mailto:mark_frein@sfu.ca) or phone (604) 291-5265 if you have any questions or concerns. Or, pass these on to Lewisa and she'll raise them with me.

Thank you,

Mark Frein

## *Sample Note to the Executive #2*

Re: Guidelines for Giving Feedback on the Presentations

Hello Exec team!

Tomorrow, the group of nine managers in the management development program will be doing the final preparation on short business cases/ideas that they worked on during the program. The nine managers are divided in three teams, and each will present a short business idea and take questions.

We have included this mini-project as part of the management development program for specific reasons. We find that middle managers often struggle with moving from problems or opportunities to actual solution recommendations. Sometimes these struggles stem from lack of knowledge or skill. Sometimes they stem from lack of experience or lack of confidence. In this program, we have tried to encourage the participants to stretch their analytical and strategic “muscles”. As with all muscle-work, exercise is the number one way to develop increased capacity. This mini-project is our form of exercise.

They will be presenting their short cases to each other and to those of you who are able to be there. I would encourage you to listen to the presentations and give feedback with certain criteria in mind:

1. Treat their ideas in the same way you’d treat a “real” business idea. The ideas are actual suggestions for improving operations or increasing profitability at the company. Treat them as such.
2. However, remember that these managers are being asked to stretch past what may be their traditional skill set or comfort zone. In particular, we have asked them to do basic financial analysis. Thus:
  - a. Try to keep your questions/comments constructive and reasoned. If you think the idea has problems, explain the reasons why you think so. If you think the idea has merits, also explain the reasons.
  - b. Try to model the kind of positive exchange of ideas that characterizes strategy-making at its finest – i.e., argumentative but not dismissive, challenging but not attacking, questioning for understanding, willingness to revise viewpoints.
3. Enjoy yourself. The presentations set the stage for the remainder of the afternoon where you and the managers will all be involved in discussing current strategic challenges and organizational culture at your company. Use the time as an opportunity to have some fun and learn something.

## Selected Further Reading

- Anderson, L. & Thorpe, R. (2004). New perspectives on action learning: developing criticality. *Journal of European Industrial Training*. 28, 8/9, p. 657.
- Marquardt, M. (2004). *Optimizing the Power of Action Learning: Solving Problems and Building Teams in Real Time*. Mountain View, CA: Davies-Black Publishing.
- Pedler, M. (1991). *Action Learning in Practice*. (2nd ed.). Aldershot, UK: Gower.
- Revans, R. W. (1971). *Developing Effective Managers*. New York, NY: Appleton Century Crofts.
- Revans, R. W. (1982). *The Origin and Growth of Action Learning*. Brickley, UK: Chartwell-Bratt.
- Schon, D. (1983). *The Reflective Practitioner*. New York, NY: Basic Books.
- Schon, D. (1987). *Educating the Reflective Practitioner*. San Francisco, CA: Jossey-Bass.

### *Job Aid – Action Learning Foundation Checklist*

Note: a simple checklist of must-have's and good-to-have's, with the critical questions to ask and have answered. In our view, not having any of the must-have's is a show-stopper. The good-to-have's enhance the power of action learning and contribute to effective results.

Must-have:

1.  Clarity of purpose on desired outcome of action learning projects.
  - Relevant questions – Are the action learning projects primarily learning-oriented, or is there a real expectation that some (or all) of the projects will be considered for actual implementation? Do the participants fully understand the expectations of the process and the philosophy and principles behind action learning?
2.  Support of senior stakeholders (rank above action learners) for the process and desired outcomes of action learning.
  - Relevant questions – Do the senior stakeholders understand and buy into the action learning process as an organizational and individual development and growth strategy? Do the senior stakeholders realize (and support) the likely result that some action learners may expect more challenge post-program? Do the senior stakeholders *care* about the results of the action learning?
3.  Self-initiating action learners.
  - Relevant questions – Are the action learners capable of owning a self-initiated and self-directed project? Do they have the time to undertake it? Have they created a team contract for their own performance?
4.  Support structure for action learners.
  - Relevant questions – Has the organization (or vendor) committed coaching, mentorship, and just-in-time resources for the action learners? Will they be given time and allowance for doing the projects? Will they be given access to information and people required for their projects?

Good-to-have:

1.  Direct involvement of senior stakeholders in action learning
  - Relevant questions – Can senior stakeholders take part in the action learning process through mentorship or supervisory roles? Will senior stakeholders attend presentations to conclude the process and discuss/vet the ideas? Will senior stakeholders take a role in the development of the projects?
2.  Action learning projects fully designed, scoped, and created by the participants (as opposed to the organization)
  - Relevant questions – Can participants be given the responsibility and right to formulate their own action learning topics/agendas?
3.  Promise of implementation if valuable to organization
  - Relevant questions – Can the promise be made, and kept, that a viable and valuable action learning project will receive real and subsequent organizational support for further investigation and development?