

A Story About Action Learning

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Over the past few years, corporate training personnel in a multibillion-dollar financial services company have made several unsuccessful attempts to interest senior management in sponsoring a leadership development program. Senior management remained uninterested, however, until a couple of division presidents learned on their own of efforts in other companies called "action learning." The presidents found this type of developmental program appealing because of the promise it holds for solving critical business problems.

Now finding some support for development where none had previously existed, the training team makes an effort to strengthen this support. Five of the division presidents soon agree to sponsor and send participants to such a program, if it will focus on solving a business problem. Clearly, their primary interest lies in the "action" part of action learning.

This message is particularly strong from the division president likely to benefit most from the effort. His division has determined that it has an image problem. The customer has changed, and the new customer seems barely aware of the firm's presence in this market segment. All of the sponsors agree that the assignment for participants in the first program will be to identify alternative solutions to this problem. With the decision made regarding the "action" assignment for the program, the training team turns its attention to designing the "learning" segments that will not only support the assignment, but also help ensure that the program's outcomes include individual and leadership development.

Their initial design is a five-week, "task force" approach during which participants are removed from their jobs and totally immersed in the project. The first eight days are to be spent in the classroom, where external faculty will

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provide input and perspectives concerning various aspects of the assignment. At the participants' request, this segment also will include efforts to help them think, as they put it, "out of the box." Further, the initial portion of the program will focus participants on individual development issues, through a series of feedback sessions and tools to help ensure the ability to work together as a team. The remaining four weeks are reserved for participants to complete their assignment.

The division presidents' response to this design is that it is too academic. They feel there is too much emphasis on the classroom and the individual at the expense of action. Sent back to the drawing board, training team members express several concerns. The presidents' strong bias for action and problem solving could, they fear, result in a project that lacks critical attributes of a true learning experience. Without the challenges of external perspectives on ways to define the problem and possible solutions, this effort could become "just another task force."

Further, the training team believes that the company as a whole needs to strengthen its "critical thinking" skills—a belief that is echoed in the participants' request for help in thinking "out of the box." If the presidents' preference for action eclipses potential learning activities, the training team sees the loss of a valuable opportunity for participants to enhance critical thinking skills required not only for a solution of the image issues, but also to strengthen the company's overall capabilities. Finally, the training team recognizes that the emerging tension they are experiencing, between action on a specific problem and broader learning goals, is likely to be felt even more strongly by program participants who will be under considerable pressure to produce a solution to the image problem.

Careful management of the balance between action and learning becomes the guiding principle for redesigning the program. Instead of being clustered at the beginning of the five-week effort, the classroom days are interspersed throughout the five weeks. This approach provides some early classroom work focused on challenging participants' initial assumptions about and biases toward the image issue and its solution. These new ways of thinking about the issue assist in attempts to gather and analyze additional information over the next few weeks. Throughout this time, at points of confusion, frustration or synthesis, additional classroom time with external faculty is offered in a "just-in-time" approach to learning. The feedback and team building components remain, but they, too, are interspersed throughout the five weeks at points calculated to have maximum impact.

The second design is enthusiastically accepted by the division presidents and later, when the program is over, all agree that the design proved to be very successful. For the training team, three key insights stand out. First, although the external faculty did their jobs well, their sessions alone were insufficient for building the desired level of critical thinking. Throughout the project, participants struggled to find effective ways to analyze and synthesize information and issues. Second, despite early opposition from the division presidents, the training team's efforts to ensure individual development had paid off. The program's opportunities for feedback and assistance on group dynamics and leadership issues were well-received by participants.

Third, and perhaps most important to them, the training team had learned a valuable lesson. Instead of being discouraged by the rejection of their early designs, their persistence resulted in a breakthrough design that ensured equal attention was paid to both action and learning.

The Journey – How This Action Learning Initiative Was Structured

One dozen participants from multiple divisions are away from their jobs – some are even away from their homes – for five consecutive weeks of this powerful intervention.

Week One

- One day with division representatives: Discuss the image issue and clarify the assignment
- Two days with external faculty: Challenges facing the industry (context of the problem); methods to ensure "out-of-the-box" thinking
- One day with internal faculty: Models for giving and receiving feedback; additional work on thinking styles

Week Two

- Customer interviews in the field

Week Three

- Two days with external faculty on strategic and tactical issues
- Participants give and receive feedback on their team behaviors so far
- Additional field work during the remainder of the week

Week Four

- Continued field work
- One day with external faculty: Implications of project findings for organizational capability and leadership
- Additional feedback sessions

Week Five

- Final reports to senior management
- Final feedback session and synthesis of learnings

The Outcomes of This Action Learning Initiative

One of the company's major divisions received substantial assistance and fresh thinking on a key strategic issue as a result of this program. The action learning team's proposals were subsequently implemented. The division president stated publicly, "In five short weeks, we received the equivalent of over \$2 million worth of consulting." Other important outcomes of the program included the insights gained by the participants into their personal leadership strengths and their potential for leadership – as well as similar insights gained by the company about the participants and organization.

Executive KnowledgeWorks' Definition of Action Learning

A learning process during which a carefully selected group of individuals is responsible for exploring, in detail, and providing recommendations on a current, specific business problem or opportunity. Throughout this process, individual learning remains a primary objective.

The Benefits of Action Learning

Because action learning can deliver two returns on investment (the business breakthrough and the individual and organizational development), it is often seen as powerful and valuable even when other types of development are not.

- The key seems to be focus. Problems and opportunities that seem to evade solution in normal day-to-day business can often be swiftly and successfully dealt with under the intensity of an action learning project.
- Participants in action learning programs are likely to have a strong need for analytical tools that help them break down and dissect information and issues. Tools that challenge conventional wisdom provide long-term developmental benefits and needed analytical assistance for both the individual and organization.
- Action learning projects provide wonderful laboratories for learning about group dynamics and leadership. Don't pass up opportunities to address these "soft" issues in the context of a real problem-solving situation.

Action Learning Fundamentals

- The two most critical success factors are:
 - 1) The problem or opportunity to be addressed
 - 2) Sponsorship
- Target a key, emerging business issue – the more compelling the issue, the more impactful the development and the greater likelihood of a business breakthrough
- Balance development and problem-solving goals – the drive to solve real problems must be balanced with and tempered by developmental considerations
- Allow time for reflection – build in ways for the participants to think about, for example, how they learn

About Executive KnowledgeWorks

Executive KnowledgeWorks (EKW) was founded in 1986 by the team of managers responsible for Motorola's worldwide executive education initiatives. For 13 years, we have been working with executives of *Fortune 500* companies in a wide range of industries.

Our Services:

- Corporate University Design and Management: We have a proven track record in the planning, design, development and implementation of HRD strategies, including the creation and implementation of the corporate university.
- Leadership Development: We have been designing and producing innovative, high-impact executive programs since 1986.
- Action Learning: Our firm is a pioneer in using action learning to tackle tough, emerging business issues while delivering valuable, timely developmental experiences for corporate leaders.

- Executive Coaching: EKW can help you serve the development needs of individual senior managers through the creation of customized individual development and coaching programs.