

A Letter to the CEO Regarding Action Learning

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I have some thoughts that might prove helpful to your organization as you consider harnessing the power of action learning. My observations are born out of 20-plus years of experience in executive and organization development. And, for good or bad, those years have produced almost as many disappointments as unqualified successes. However, when there were successes, they have served the organizations well, by providing accelerated development and powerful breakthroughs. However, with the possibility of those breakthroughs come a number of significant but manageable risks. The purpose of this memo is to detail the ways in which you can reduce those risks and increase the likelihood of obtaining a strong return on your investment.

First, as to the question of what action learning is, the definitions are all over the board--everything from the use of customized cases employed during fairly traditional executive education programs to outward-bound team building.

Action Or Learning?

Our firm -- Executive KnowledgeWorks -- in Crystal Lake, Illinois --thinks of action-learning in the same way that GE and Motorola implemented it. As a former Manager of Management and Executive Education at Motorola, I conducted my first action-learning project in the mid 1980s. Since then and subsequent to founding Executive KnowledgeWorks, my associates and I have been implementing action-learning projects with a philosophy consistent with those early and successful Motorola experiences. For the past 15 years we have thought of action learning as:

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A problem solving process in which a carefully selected group of individuals both explores in detail and provides recommendations on a specific and, ideally, critical business problem or opportunity. Throughout the process, individual and/or team learning remains a primary objective.

Contrary to what you might expect, we do not believe that learning should be **the** primary objective. Instead, we counsel our clients that solving the pressing business problem or opportunity comes first. This in turn energizes and strengthens the learning component of the action learning process.

Predicting Impact

Executive KnowledgeWorks (EKW) has developed a method for predicting the action learning project's likely impact before it is launched. We accomplish this by looking at five variables and assigning a score from 1 to 10, based on where your proposed program falls on the continuum for each of the five. The score for each variable indicates both the level of risk and the likely positive impact.

I recommend that, as you get close to committing to an action learning initiative, you and your team take a few minutes to talk. Don't be surprised if there isn't an initial consensus as to the desired balance for each of the five. Like most promising endeavors, action learning inevitably involves a series of trade-offs.

The Five Decisions That Influence Both The Nature And The Degree Of Impact For A Given Action Learning Project:

1. The Assignment
2. The Team
3. The Nexus of Control/Authority
4. The Learning Targets
5. The Support System

Executive KnowledgeWorks' experience with a number of major U.S. corporations suggests that the decisions you make in each of these five areas prior to launching your action-learning project determine, in large measure, both the nature and the extent of your return on investment. We believe there is such a strong relationship between these design decisions and your results that we created a taxonomy, or classification, of action learning projects that divides them into five levels, in which:

- “Level One” equals the most modest of the undertakings with a corresponding modest likely impact, but not a corresponding modest level of risk.
- “Level Five” are the most ambitious action learning endeavors with a corresponding reward and, surprisingly, some *reduction* in the level of risk.

The Range

Consider these two descriptions of the extreme ends of the taxonomy:

A Level One Action Learning Project

A team of valued but not necessarily exceptional managers come together to consider (and affirm?) a decision or course of action that is favored by senior management. Human Resources tightly designs the project and an ambitious schedule allows for the team to explore and gather some new information. But, the bulk of the learning comes from the company's internal technical experts. The participants of the action learning team rotate as team leaders and facilitators.

Executive KnowledgeWorks believes that we could expect this kind of Level One action learning project to:

- validate rather than discover or generate breakthrough
- experience minimal, if any, learning and individual or team development
- raise questions, even among the team members, about the advisability and wisdom of employing such a process in the future
- be seen as a costly experiment
- create little, if any, excitement, ownership or momentum in the organization.

A Level Five Action-Learning Project

Senior management is clear that there is an unresolved and strategic problem or opportunity. It commissions an internal team of high potential managers to consider the issue, explore potential solutions and recommend a course of action. The team has a clear deadline and ready access to resources, including a professional facilitator. The team determines its plan of action, and that plan must include time for learning, feedback and reflection. All reflection must focus on both the team's experiences and those of the individual members.

Executive KnowledgeWorks' experience suggests that a Level Five Action-Learning Project is more likely to:

- achieve an industry or company breakthrough
- instigate rich individual and team learning -- perhaps the most intense learning of the participants' careers.
- create significant organizational excitement, ownership, and momentum for the recommended solutions.
- model and create strong interest in this kind of focused breakthrough project as a preferred mode of organizational problem solving
- be seen as an exceptional return on investment.

The Five Key Decisions

Allow me to explain the rationale behind these predictions. While most of EKW's thinking is fairly straightforward and self-explanatory, some of it is a bit counterintuitive. All of it is grounded in corporate action learning experiences.

The Assignment

Issues that are big, bold and truly unresolved tend to motivate and stimulate a team to exceed their individual and collective best. Such assignments energize and focus the rest of the organization. The net effect is that a properly framed, strategically-focused stretch assignment dramatically increases the likelihood of achieving a significant business breakthrough and high R.O.I. We look for the following when assessing the "assignment" portion of an action-learning project:

- a strategic rather than tactical focus
- project results that matter to the organization
- an answer that isn't a known or a given
- an assignment (the team's work) that has visibility
- a sponsor who is the highest level individual owning responsibility for the issue
- a sponsor willing to frame the assignment for the team
- a framing of the assignment that includes clear expectations regarding learning
- a balance between focus/scope and the resources being applied to the project
- an action learning project that is a stretch for both the organization and the team.

As with each of the other Five Key Variables, Executive KnowledgeWorks assigns a value between 0 and 10 points to this category based on the above considerations.

The Team

Selection of the action learning team is one of the two or three areas where our experiences and advice are somewhat counterintuitive. This is particularly true when considering our opinions regarding the creation of the team. EKW looks for and recommends:

- small teams (10 -- 15 participants)
- a significant ration of high potentials -- the people that may be least available for special assignment
- a balance between function, gender and other considerations
- a bias toward participants who do **not** know the business under consideration.

Up to 80 percent of the participants should come from functions (business units, divisions, etc.) other than those that are the focus of the project (they are the most free to ask the dumb questions that lead to breakthroughs). Again, we would assign this category a value from 0 to 10 points based on the above considerations.

The Nexus of Control/Authority

In EKW's experience, control is a major variable in the success of action learning projects. While it may be somewhat counterintuitive, we've learned that projects have less impact if senior management and/or the design team tightly control them. This loss of control causes some discomfort for high control CEOs and executives. However, giving the action learning team proper authority increases their ownership and initiative, and results in a team that imposes higher standards on itself than would its sponsors.

- With the exception of a few sacred "designers' prerogatives" or sponsor's requirements, the action learning team (not the HRD design team) determines the how, when and where of the project.
- If there are givens, partial decisions, commitments or strongly held biases on the part of the sponsors and/or senior management, they are communicated early and clearly.
- The team knows what financial and other resources are at its disposal and/or it knows where and how to secure those resources.

The Learning Targets

Even a traditional task force learns as it takes on its challenge. What differentiates action learning (even Level One action learning) from a task force is the *nature* of the learning. Higher level (and higher impact) action learning projects are likely to have the following learning characteristics:

- the project pursues process learning (e.g. how is the team handling conflict or making decisions) as well as task learning (e.g. what is the maximum through-put of our competitor's distribution facility)
- from the moment the assignment is first given, learning (both process and task) is identified as a primary -- but not **the** primary -- objective
- the process learning focuses on both the individual team members and the team as a whole
- some, if not much of the learning (both task and process) is just-in-time
- the learning is linked, by design, to the process support/facilitation.

The Support System

Teams that have ownership of high visibility, high stakes projects tend to get energized - especially when populated by high potentials. The hours can be long; the commitment to individually held hunches and hypotheses intense. At other times, variations on "tunnel vision" and "groupthink" can take hold. These conditions and numerous other argue for professional facilitation. The absence of such support takes a significant and unnecessary toll on the participants (conflict and tension) and the organization (distraction and distrust), as well as on the net impact of the project. EKW strongly recommends process support where the facilitators are:

- **not** team members
- experienced in action learning facilitation
- business-savvy (ideally with client specific knowledge)
- assigned to all plenary sessions
- available for all of the team's field activities (with additional facilitators available as required)
- ideally, experienced at one-on-one coaching and feedback.

The Executive KnowledgeWorks Action Learning Taxonomy

There are, beyond these Five Key Variables, other issues to consider. They include timing and the degree of team immersion. But, my experience suggests that these Five Key Variables determine most everything else, including the probability of success.

To streamline communication and increase awareness regarding these Five Key Variables, Executive KnowledgeWorks uses a five-level Taxonomy. We assign scores from 0 to 10 for each of the five variables, and a score from 0 to 50 for the overall action learning project. The results of that analysis can be communicated as:

- Level One – 1 to 10 Points
- Level Two -- 11 to 20 Points
- Level Three -- 21 to 30 Points
- Level Four -- 31 to 40 Points
- Level Five -- 41 to 50 Points

We do not believe that a Level Five project is the only good action-learning project. We've helped organizations achieve desired and desirable results at various levels. However, I would encourage you to remember that, as you move up in Levels, there is a direct relationship with impact, and a surprisingly *inverse* relation to risk.

Again, I believe it would be worthwhile to discuss these ideas with your senior management and your action learning design team. In doing so, you can significantly reduce your risks and increase the likelihood of an unqualified success.