O ver the past few years, corporate training personnel in this multibilliondollar financial services company have made several unsuccessful attempts to interest senior management in sponsoring a leadership development program. Senior management remains uninterested, however, until a couple of division presidents learn, on their own, of efforts in other companies called "action learning." The presidents find 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 efforts 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 this 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 off their jobs and totally immersed in the project. The first eight days are to be spent in the classroom, where external faculty will provide input and perspectives concerning various aspects of the assignment. At participants' own request, this segment also will include efforts to help participants 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."

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Further, the training team believes that the company as a whole needs to strengthen its "critical thinking" skills—a belief that is echoed in 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 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 off e red 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 has proven 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 quite 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 break through design that ensured equal attention was paid to both action and learning.

Action Learning

By helping to ensure a high return on the investment in executive education, "action learning" may be viewed as valuable when other types of development are not.

Action learning is more than simply assigning a problem to be solved. The broader learning opportunities inherent in addressing a specific issue must be identified, nurtured and carefully processed in order to realize the full developmental value of the effort.

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 developmental benefits as well as needed analytical assistance.

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.

This company intended to build an action learning program right from the beginning of the design process. But other programs described in this book illustrate that effective action learning is not always the result of a planned process. Opportunities for action learning may well *grow out of* classroom programs, especially if those programs are built on key emerging business issues.

The Journey

One dozen participants from multiple divisions are away from their jobs—some are away from their homes—for five consecutive weeks during this program.

Week One
One day with division representatives, discussing the image issue and clarifying 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

One of the company's major divisions received substantial assistance and fresh thinking on a key strategic issue as a result of this program. Other important outcomes of the program include the insights gained by participants into their personal leadership strengths and potential— as well as similar insights gained by the company about the participants—and company-wide reinforcement of the benefits that accrue to a learning organization.