

## Briefing on action learning

The action learning briefing resource contains three main sections: a background to action learning; an introduction to 'learning to learn' and the learning cycle with practical exercise, built around establishing a 'log book' to record personal learning insights, experiences and reflections.

### Background to action learning

If it's good enough for Nobel prize-winners...

Imagine, if you will, that you are a research physicist. Just when years of painstaking effort seem about to bear fruit, you come up against an intractable problem. Fortunately you are surrounded by other research physicists - past and future Nobel prize-winners. Unfortunately none of them works in your field. Does this stop you seeking their help? If you are sensible, and want to win a Nobel Prize yourself, it does not. You put your problem to them. But what can they possibly do to help you out of your impasse?

Back in the 1930s, a young man called Reg Revans found himself working with just such a high-powered group at the University of Cambridge. When they were faced with difficult research problems, he found that they would sit down together and ask one another lots of questions. No one person was considered more important than any other and they all had contributions to make, even when they were not experts in a particular field. In this way they teased out workable solutions to their own and one another's problems. Revans was so taken by this technique that, when he went to work at the coal board, he introduced it there. When pit managers had problems, he encouraged them to meet together in small groups, on site, and ask one another questions about what they saw in order to find their own solutions, rather than bring in 'experts' to solve their problems for them. The technique proved so successful that the managers wrote their own handbook on how to run a coal mine. In this way, action learning was born; but it was some years before Reg Revans presented the cogent and tested theory which is now the cornerstone of all IMCA Socrates™ work.

### Focusing on the question

Small children ask questions. How? Why? What? Where? Who? and question When? Parents may despair of the number; sympathetic teachers encourage the quest for knowledge and provide, whenever they can, opportunities for the children to answer their own questions by experiencing something for themselves. As the children get older, their teachers (themselves in possession of a vast number of facts which they feel need to be passed on to their charges) tend not to wait for the questions to be asked. They concentrate increasingly on supplying knowledge and on testing that their students have learned it and can produce the right answers to order.

It is a very long time before students are considered sufficiently well programmed with available information to start asking questions again which will lead them to find their own solutions to unsolved problems; so long that many will have already gone off to work in the 'real' world, perhaps under the mistaken impression that the answers to problems always exist in books, if only you know where to find them - or the expert who knows them already. This knowledge which already exists, which is already written down in books, theories and concepts with which students can, if you like, be 'programmed' and on which much of the learning in traditional education focuses. Reg Revans called this 'P' for programmed knowledge.

Revans accepts that 'P' is an essential ingredient of learning, but feels it to be insufficient. He believes that there is an equally important component, one which has tended to be squeezed out by traditional educational methods. This he calls 'Q' for questioning Insight.

If learning is represented by 'L', this gives the equation:

$$L = P + Q$$

Concepts and theory are important, but in action learning, the emphasis is on applying them. And so it is on 'Q' that Revans focuses - on the questions which need to be asked and the experience which is waiting to be acquired. For Revans, the core of action learning lies in the ability to ask the right questions at the right time and take effective action.

## Asking the right questions

What exactly are the 'right questions' in an action learning context? The 'right questions' are simply those which, when asked of the right people at the right time, give you the sort of information which you need, questions like...

- What are we trying to do?
- What is stopping us from doing it?
- What might we be able to do about it?
- Who knows about the problem?
- Who cares about it?
- Who can do anything about it?
- Where can we find out about it?

There are many similar questions which you might choose to ask. If you fail to come up with the right questions for a given situation, you fail to get the information which you need to solve your problem. It is therefore vital for anyone involved in action learning to spend adequate time working out what the right questions are for the particular problem which he/she is trying to solve. The wrong questions waste everyone's time and are unlikely to provide useful answers.

## Puzzles versus problems

By focusing on the right questions rather than the right answers, action learning focuses on what you do not know rather than what you do know. This means that it deals not with puzzles but with problems. A puzzle could be defined as a perplexing question to which an answer or solution already exists; you just do not happen to have found it yet. A problem, on the other hand, has no existing solution. Different people will come up with different ideas and suggestions as to how to solve it. There will be no right answer but a number of possible solutions which might be equally satisfactory.

So action learning tackles problems not puzzles. It does this by a process of first asking questions to clarify the exact nature of the problem, then identifying possible solutions and finally taking action. It is not about 'analysis paralysis' - spending so much effort on analyzing the situation that effective action is either non-existent or delayed to the point where it is irrelevant. It is about taking that information, seeing what courses of action are open to you, deciding which one to take and then doing something about it. So, action learning is about doing. But it does not stop there. Doing may be vital, but it is not in itself sufficient for learning to take place.

Learning by doing may be sufficient - if you are attempting to acquire a basic mechanical skill, like riding a bicycle. If you try often enough and succeed often enough, you will eventually learn how to do it efficiently whenever you wish. But in the complex world of problem solving, doing does not, in itself, lead to learning. You will not learn anything about solving your next problem purely from the act of solving your present problem. For learning to take place you need to do more than just experience solving your problem effectively; you need to reflect on that experience in order to identify exactly what it is that you have learned, internalize the lessons which you can learn from it, and pragmatically devise action plans, so that you can take effective action in the future in a new and different situation. That is what action learning does. That is how it differs from learning by doing.

## Action learning for managers

Most managers are profound believers that Hamlet could have done what was necessary much more quickly, had he not spent so much time talking about it .. research in the field shows that most managers spend more time doing than thinking. Many management training courses spend more time on thinking than doing, emphasizing 'P', concept and theory. Action learning, by focusing on doing and reviewing, suits most managers very well and, by providing them with opportunities to solve real problems in their own workplace and learn from that experience, helps them to improve their managerial performance and, in turn, profits the bottom line. Because of its proven effectiveness, there has been a tendency, in the past, for people who get involved in action learning to become somewhat evangelical about it - and a certain degree of evangelism is often necessary in the beginning, if even the best ideas are to survive. But it is not a religion. The truth is that action learning is one of a number of effective management development techniques, albeit one which appears to be particularly well suited to a great many managers and one which produces immediate and tangible dividends for their sponsoring organization through the project work which is an intrinsic part of all IMCA's work. But it may, as you will discover later, be of more benefit to some than to others, and you should also recognize that there are times when action learning, as a technique, should not be used at all.

*Do not be tempted to use action learning:*

- When an answer to the problem already exists. This means that it is a puzzle and not a problem, and action learning does not address puzzles.
- When a traditional 'programmed learning' type of approach will produce a solution. Action learning is quite a long, complex process; expensive in terms of time, effort and money. If an effective solution can be found more quickly and cheaply by using a more traditional method, use it.
- When systematic analysis will give you a solution. If this is the case, it is likely to be much faster and probably more effective.
- When senior management will do exactly as they want, regardless. It can be a very destructive experience for a group of managers to work hard at solving a problem for a considerable length of time, using action learning techniques, only to have their ideas rejected by an unsympathetic, inflexible senior management.

*Use action learning, only:*

- When no one knows the solution to a problem or the way out of a complex situation.
- When there is no obvious solution to try or nobody is prepared to come up with one.
- Where the organization and its senior management are committed to the technique and prepared to consider implementing the proffered solution.

**Action learning sets**

In action learning, managers learn to take effective action by reviewing and interpreting their experience in order to identify what it is which they have learned. A systematic approach to learning, focused primarily on the dynamics of the manager's role and environment, rather than simply grasping random opportunities as and when they arise, ensures that managers learn much more efficiently. This can be achieved only via the dynamic interplay between members of an action learning set.

An action learning set must have four basic features if it is to live up to its name. It needs projects or problems on which to work; clients for whom to work; a group of 'comrades in adversity' with whom to work; and a 'set adviser' to facilitate the learning process. We will consider the first two of these in more detail here. The work of the set adviser is considered in the set advising briefing resource.

**Projects**

Projects in action learning courses are, in effect, the vehicles for learning. A project must be a real management problem, task or issue which needs to be addressed and exists in a real time-frame. In other words, someone somewhere in the manager's organization should want a result by a definite (but reasonable) date. Furthermore, to justify the investment of funds in the project a tangible return is expected. The project should be substantial and demanding enough to involve the manager engaged on it in some reasonably strenuous work. An insignificant project would not be worthy of the time, energy and effort expended on it. If a project is part of a manager's work and he or she is in a position to implement solutions, it will be very much easier to get fully involved with it and to deliver the tangible return. Remember though, managers will be carrying out all their normal duties while engaged in an action learning course.

Each project in an action learning course needs a 'client' who 'owns' the particular problem, issue or task and cares very much about it. He or she may even spend sleepless nights worrying about it. This client might well be the manager's boss; but, whoever it is, he or she has got to want and need results. It is most important that a client should be committed to the principles of action learning and be prepared seriously to consider accepting the manager's recommended solution.

In summary then, projects have a dual function. They contain real work of practical use to the individual manager and the manager's company and in addition they provide a vehicle for learning about the processes of management. Projects must contain these two elements in balance to be acceptable, i.e. concern for immediately useful action must not overwhelm the opportunities to learn, while the creation of an effective learning process must not degenerate into a lifeless, albeit scholarly, project. Terms of reference: specifying the nature, objectives, methods of working and 'internal client' for each project should be agreed in advance. The production, clarification, discussion and implementation of these terms of reference themselves illustrate the duality of taking effective action and learning from it. The terms of reference should ideally form part of a formal project proposal, of about 1,000 words. This will then be the basis of agreement of the project among the manager, the set adviser, and the client. The widest feasible scope, providing for flexibility, relevance and immediacy, however, contains risks of confusion and lack of clarity for any project.

The following general rules will reduce the risk that the project will fail to satisfy its main objectives:

- The project must involve action by the manager within the business. It must involve the manager in more than data collection, review and recommendation. As a minimum it must involve responsibility for undertaking relevant managerial action as part of that process.
- It is preferable that in addition to action during the project, the manager has responsibility for taking action as a result of it. This could involve implementing some or all of the recommendations arising from it.
- There must be careful discussion about the level at which the project is to be conducted. For the project to have development value for the manager and the potential for action, it must not be pitched at a level which inevitably means that both the content and the possibility of action are above the level at which the manager currently operates.
- Where a number of projects are being carried out in one organization considerable care must be taken to clarify the relationship between the projects.
- Notwithstanding the comments at 1- 4 above, the project selected should always endeavour to work on issues perceived to be of key significance for the success of the enterprise in the next two to five years.

## The set

Action learning is a sociable activity, not something which you do on your own. It needs a group of people - whether they be physicists, pit managers, bank managers or a mixture of all three. A 'set' is the name given to the group of real managers working on real problems in a real time-frame, looking for real solutions using action learning techniques. They are, to use Reg Revans' phrase, 'comrades in adversity'. They all have their backs against the wall, in that they all need to find solutions to real and pressing problems. History shows that people work best together when faced with some difficulty or threat.

Each member of the set is as important as every other member of the set and each has a contribution to make. They need to be able to support, advise and freely criticise one another. The set also needs to be able to call on external experts and specialists when required, but not to have them thrust upon them. Each member of the set takes on a firm commitment to get a useful piece of work done and to understand what is being learned in the process. The strength of the set is a crucial factor and within IMCA some have articulated mottoes such as 'If one fails, we all fail'. Set working is widely credited with our highly successful completion rates.

## Learning to learn

The fact that you are reading this resource shows that you are already pretty good at learning. You obviously know how to read. And you have learnt to speak English, either as your mother tongue with no trouble at all, or as a second language. But did you ever learn how to learn? Did you need to? If not, why should you bother now? And what exactly do we mean by *Learning to Learn* anyway? In his book *Helping Adults to Learn to Learn*, Robert M. Smith describes it as "...possessing or acquiring the knowledge and skill to learn effectively in whatever learning situation one encounters".

How do we learn to learn when our jobs keep us so busy? The article: 'Action learning in action' in: [Articles on action learning](#), considers how action and reflection can help us to review and improve the ways in which we work.

The set members with whom you will be working will be encountering a number of different learning situations while on the course and even more in the course of their work as managers. It is obviously in their interest to learn as much as they possibly can from them, if they want to improve their managerial effectiveness. But not all managers will get the same benefit out of the same learning situation. You have almost certainly, at some time during your career, been on a management training course with a group of fellow managers, all with similar amounts of experience and a desire to learn as much as they could from it. At the end of the course, some of them probably thought that it was most enjoyable and extremely useful, while others thought it a complete waste of time. How could this possibly be, since they all went through exactly the same course?

A large part of the answer lies in the fact that different people have different ways of learning, ways which seem more natural to them, ways which they prefer. This means that some types of learning experience suit them better than others. If a course offers them plenty of their preferred type of experience, then they are likely to enjoy it and to learn a lot from it. If not, then it may well turn out to be for them, a complete waste of time. Set members will benefit greatly from understanding that different people have different ways of learning, not least because it will explain some of their previous failures - and successes. At the outset, they will spend time studying how people learn. They may also complete a learning styles questionnaire to discover their own preferred learning style (or styles) so that they can capitalize on their strengths and build, if they wish, on their weaknesses.

To be effective as a specialist adviser or set adviser, you must also understand how people learn.

The individual learning preferences of different members of the set will affect how they respond to different learning experiences and opportunities, how ready they are to learn from them, how difficult (or easy) it is for them to learn from them, and how well they learn from them. Although it will be impossible to please all of them all of the time, if you understand that there are different types of learner, you will be better able to help them to get maximum benefit from the pathway. You can do this by providing, where possible, different types of learning opportunity within sessions and by suggesting different types of activity between sessions. You can also encourage set members to make better use of one another's preferred learning styles.

By understanding that you too have a preferred learning style, and finding out what it is, you will be in a better position to understand the strengths and weaknesses of set members with different styles from your own. You will also understand why they respond to you as they do. The person who never looks enthusiastic and never seems to want to speak may be learning just as much as his or her neighbour, but may simply be a 'reflector' who does not wish to commit him or herself too hurriedly. For some tutors (or specialist advisers) and set advisers this can be a revelation.

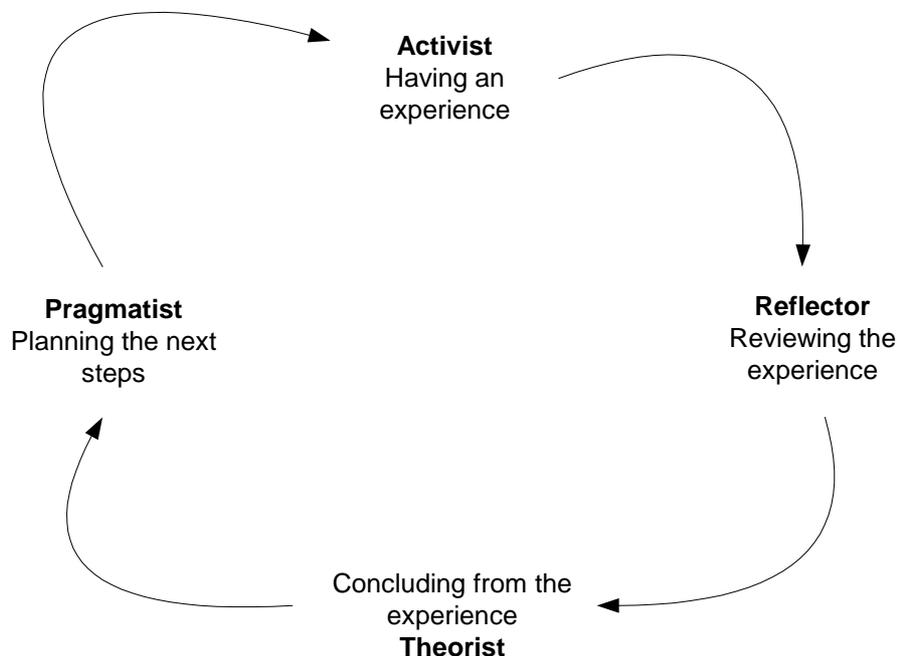
### What do we mean by learning?

You probably know exactly what is meant by learning. It is, nevertheless, still worth defining it in the present context.

Surprisingly little is known about how people actually learn, though there are a number of theories; so it is perhaps easiest to define learning 'after the event'. by asking how you know whether or not learning has, in fact, taken place. You know that learning has taken place, when you know something which you did not know before and can show it and/or you are able to do something which you were not able to do before.

### The learning cycle

There are several schools of thought and theoretical models of how people learn. One of the most useful for IMCA's work, in terms of the manager as a learner, has proved to be that initially developed by David Kolb. In it learning is presented as a cycle.



Expressed in this way, you can see very clearly how this also ties in with the sequence employed in *action learning*.

Although, hypothetically, a learner would consciously move through every stage in the cycle in every learning situation, practical experience and research show that not all learners are equally at home at all stages of the cycle. Many show marked preferences for one or more of the stages and sometimes positive dislike of one of the others. And there is no evidence to show that such preferences make them better or worse than one another. Honey and Mumford have identified four different preferences, or ways in which people prefer to learn, each related to a different stage of the learning cycle. These preferred learning styles they call activist, reflector, theorist and pragmatist. Some people are happiest operating in just one mode, others in two or even three. Perhaps not surprisingly, people's learning style tends to reflect their managerial style...or vice versa.

## Preferred styles of learning

### Activists

Activists involve themselves fully and without bias in new experiences. They enjoy the here and now and are happy to be dominated by immediate experiences. They are open-ended not sceptical and this tends to make them enthusiastic about anything new. Their philosophy is 'I will try anything once'. Their days are filled with activity. They tackle problems by brainstorming. As soon as the excitement from one activity has died down, they are busy looking for the next. They tend to thrive on the challenge of new experiences but are bored with implementation and longer-term consolidation. They are gregarious people, constantly involving themselves with others but, in doing so, they seek to make themselves the centre of all activities. Activists learn best from novel experiences, from being encouraged to 'have a go' and from being thrown into things. They enjoy relatively short 'here and now' learning activities like business games and competitive team exercises. Activists learn least well from passive situations like reading, watching or listening to lectures, particularly those on concept or theory. They do not enjoy solitary work, repetitive tasks, situations which require detailed preparation, or being asked to review their learning opportunities and achievements.

### Reflectors

Reflectors like to stand back to ponder experiences and observe them from many different perspectives. They collect data, both first-hand and from others, and prefer to analyze them thoroughly and think about them from every possible angle before coming to any definite conclusions. These they postpone as long as possible. Their philosophy is to be cautious. They enjoy watching other people in action and prefer to take a back seat in meetings and discussions. They think before they speak. They tend to adopt a low profile and have a slightly distant, tolerant, unruffled air about them. When they act, it is part of a wider picture, which includes the past as well as the present and others' observations as well as their own. Reflectors learn best from activities where they are able to stand back, listen and observe. They like to have a chance to collect information and be given time to think about it before commenting or acting. They like to review what has happened. Reflectors learn least well when they are rushed into things with insufficient data or without time to plan, when they are forced into the limelight by being required to role-play or chair a meeting, or when asked to take short cuts or do a superficial job.

### Theorists

Theorists like to analyze and synthesize. They assimilate and convert disparate facts and observations into coherent, logical theories. Their philosophy prizes rationality and logic above all. They think problems through in a vertical, step-by-step, logical way. They tend to be perfectionists who will not rest easy until things are tidy and fit into a rational scheme. They are keen on basic assumptions, principles, theories, models and systems thinking. They tend to be detached, analytical and dedicated to rational objectivity. They feel uncomfortable with subjective judgements, ambiguity, lateral thinking and anything flippant. Theorists learn best when they are offered a system, model, concept or theory, even when the application is not clear and the ideas may be distant from current reality. They like to work in structured situations with a clear purpose, and be allowed to explore associations and interrelationships, to question assumptions and logic and to analyze reasons and generalize. They like to be intellectually stretched. Theorists learn least well when asked to do something without apparent purpose, when activities are unstructured and ambiguous and when emotion is emphasized. They do not learn well when faced with activities lacking depth, when data to support the subject are unavailable, and when they feel 'out of tune' with the rest of the group.

### Pragmatists

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They are the sort of people who return from management courses bursting with new ideas which they want to try out in practice. They like to get on with things, and act quickly and confidently on ideas which attract them. They tend to be impatient with ruminating and open-ended discussions. They are essentially practical, down-to-earth people, who like making practical decisions and solving problems. They respond to problems and opportunities "as a challenge" Their philosophy is 'There is always a better way' and 'If it works, it is good.'

Pragmatists learn best when there is an obvious link between the subject matter and their current job. They like being exposed to techniques or processes which are clearly practical, have immediate relevance and which they are likely to have the opportunity to implement. Pragmatists learn least well where there are no immediate benefits or rewards from the activity and the learning events or their organisers seem distant from reality.

Honey and Mumford (among others) have designed a questionnaire from which you can discover your own preferred learning style(s). As a learner, once you know your areas of strength and weakness, you are in a much better position to choose learning experiences and opportunities which suit you, or to develop your weaker styles in order to be able to extend the range of experiences from which you are able to learn.

Most managers claim to 'learn from experience' but not all managers have the same motivation to learn. They may not have a working environment which encourages learning and their own preferred styles of learning might not fit the kind of work experience in which they are engaged. The article: 'MBA action learning: A Malaysian perspective' in: [Articles on action learning](#), sought to capture the discussion that took place during an internet conference on how senior managers undertaking an IMCA MBA in Malaysia used the course and each other to learn from their work experience.

## Practical: Establishing your own learning log book

Keeping a learning log book can help you to identify useful learning experiences and develop your own learning so that you can see ways of taking appropriate, personal action. At work, it will also help you to be more effective. Many factors influence our ability to learn. Two categories which are worth mentioning here, if only in outline, are individual blockages (see 'the evaluation of learning') and the skills required for effective learning to take place:

### Skills involved in effective learning behaviour

Alan Mumford devised the following list of skills which he considers necessary if we are to learn effectively:

The ability to establish effectiveness criteria for yourself.	The ability to listen to others.
The ability to measure your effectiveness.	The capacity to accept help.
The ability to identify your own learning needs.	The ability to face unwelcome information.
The ability to plan personal learning.	The ability to take risks and tolerate anxiety.
The ability to take advantage of learning opportunities.	The ability to know yourself.
The ability to manage your own learning processes.	The ability to share information with others.
The ability to analyze what other successful performers do.	The ability to review what has been learnt.

Question: which of these items do you need to work on at the moment?

### Getting started with your own learning log

- Think about a significant event.
- Select a part of it (15 minutes or so) and describing exactly what happened.
- List the conclusions which you have reached as a result of the experience, in effect, your learning points.
- Decide which of these learning points you wish to implement in the future.
- Form an action plan of what you are going to do and when.

You will find there are different occasions on which entries should be made, e.g. during and immediately after a significant event, e.g. an experience, meeting or discussion at work; at the start-up of an action learning course; related to specific activities during course events; at the end of each week of a course; a major task at work; at the start of a project or major assignment; at the completion of major tasks, projects and assignments.

**Significant events:** it is neither practicable, nor useful to record every event. You may be able to identify an important experience in advance, or you may recognize after the event that something significant (to you) has occurred. Such events may occur within the formal context of the course or outside it. The process of collecting information from colleagues for a session or for written assignments may be equalled by similar experiences at your place of work. In the same way, your record of interesting learning from action learning course discussions should be paralleled by your experience from other projects or group discussions. This integration of learning both from the course and from normal work experience is a significant objective of the learning log. You may have learnt something in terms of content (the meeting demonstrated the kind of benefits sought by customers) or process (I saw how the chairman handled some difficult interventions. He made everyone happy by...). So, how will you apply these experiences and observations so that you learn from others?

**Weekly review:** the purpose of a weekly log book review is to draw threads together by considering previously unconnected experiences recorded earlier. It will probably be a summary of main points, or conclusions from a number of events. You may wish to try to draw things together. For example, note how a given experience showed how / why Charles Handy's organizational theory is relevant to me / us / my organization.

The form in which you keep your personal log book should reflect the objectives above, i.e. the log book should not be seen solely as record, but as a means of securing action.

You will certainly benefit from reviewing your log book with your own colleagues after major tasks, assignments and projects. Try to make your review explicit in relation to your own action plan(s), rather than generalized. For example, instead of simply noting that you did not learn from a particular experience, try and analyze why (perhaps by looking at your own behaviour, not that of others).

Note that the activity suggested here, builds on the concept of the learning cycle:

- Step 1: Having an experience: A preference for an activist learning style equips you for stage 1.
- Step 2: Reviewing the experience: A preference for a reflector learning style equips you for stage 2.
- Step 3: Concluding from the experience: A preference for a theorist learning style equips you for stage 3.
- Step 4: Planning the next steps: A preference for a pragmatist learning style equips you for stage 4.

The learning log especially helps you to carry out steps 2, 3 and 4. Keeping a log also helps 'force' you (if that is what it takes!) to search out and take learning opportunities, since the discipline of making log entries puts a certain amount of pressure on you to have something to enter!

If you have a high activist and low reflector score you will probably find the disciplined approach outlined here uncomfortable and perhaps initially unrewarding. Have patience and persevere - a number of high activists have said that the process was in the end very important for them. All-round learners, or integrated learners as they are sometimes referred to, are clearly best equipped to manage all four stages. However most people develop learning style preferences that assist with some of these stages and hinder others. (for example: have learning style strengths that help with stages 1 and 4 and weaknesses that hinder stages 2 and 3.) Either you can accept this situation or do something to nurture the undeveloped aspects of your learning style. The advantages of having a broader range of learning skills are that you become a more effective learner from life's events and, if you are a trainer, you are more likely to be able to help a greater range of people with learning style profiles that are very different from your own.

To help you reflect on your own experiences and learn from them, guidelines on how to keep a learning log can be found in [Appendix 1](#). Why not use this framework or customize it to suit your own needs - it has helped many managers around the world to learn more from the daily events and experiences at work.

## Checklist for action

- Do you have a definition of learning which you use in designing or recommending learning activities? Does it need to be changed?
- Do you include 'learning how to learn' as an explicit subject and process in your courses or personal counselling of managers?
- What is your view on the significance of organizational and personal blockages to learning? Do you need to do more to help overcome them?
- Do your present processes take sufficient account of different preferences in the associate's approach to learning? What changes in the design of your programs would be necessary in order to meet individual preferences more effectively?
- If further action on learning to learn is desirable, who has to be convinced and how may this best be done?
- What are the implications for the roles of tutors? What needs to be done to meet these implications?
- Would it be appropriate to work on the skills of learning on any of your programs?
- How could you engage managers on a real commitment to learning to learn? What activities can be used to generate this commitment?
- How can you provide reinforcement on learning to learn during and after programs?
- Which of the strategies (theory first or activity first) would be most appropriate for which of your programs?
- Which of the processes (e.g. with or without diagnostic instruments) for working on learning to learn will be most appropriate for which programs?
- What master plan do you need?
- How will you monitor and evaluate actions on learning to learn?

## Appendix 1: Keeping a learning log

A suggested approach to recording your insights and experiences ...

The idea of keeping a learning log can be introduced at different stages of a programme or counselling process. In many circumstances it may be appropriate to launch it at the start, as a means of helping to generate information which will enable people to better understand their own learning processes.

It is also possible to introduce at a later stage - it may be that the trainer or adviser will choose to wait for an opportunity deriving from an actual experience and use it to show the desirability of keeping a log. Alternatively, it might be introduced as a consequence of an exercise in which participants have been asked to review their learning experiences, for example, on a course. Predictably, if they have not kept a log, some may struggle to remember some of their experiences or may miss out some significant aspect. The log can then be introduced as a practical answer to being able to do the exercise better next time and, more pertinently, as a device for capturing your learning at work.

Some managers like to have detailed guidance on how to keep a log, to the extent of actually having a booklet complete with headings and blank sections. Here is a typical example.

Whatever the chosen format, the main headings need to be based on stages in the learning cycle:

- Data about the experience
- Conclusions
- Plan

It is very easy for managers to get overwhelmed in an attempt to record everything. Understandably, they then get very de-motivated when they find this is either impossible or too time consuming. Our recommendation is that managers should be selective and pick out the most significant experiences they have had on any particular day or within any major activity. They should then use the main headings to record what has happened and what they have learned from it.

People often need guidance on the kind of thing that it is worth looking out for, such as:

A meeting, the contents of which generated some learning (*"I did not previously understand why the customer was looking for that particular benefit" .*)

A meeting where the processes rather than the content generated some learning (*" I saw how the Chairman handled some very difficult interventions in a way which left everyone feeling happy"*).

On a course it might be recording something learned in a group discussion, something crucial learned from a lecture or case study, or something learned from the processes through which the knowledge was acquired.

The most effective logs include specific statements rather than general statements, both about things experienced and about action plans arising from them. An example might be: *"I tried to persuade the group that we should set measurable objectives before we started. I was only partially successful in this because I hadn't thought of possible examples in advance and couldn't think of any fast enough when asked, at the meeting, what I had in mind."*

An action plan would similarly have something like, *"I learned that I should have some specific examples to offer rather than expecting to convince people of the general desirability of whatever I have in mind. I will do this for the meeting on Monday."*

One of the objections which is often raised is that managerial work does not encourage the kind of reflection which the log is clearly advancing. Managers will quite often say they are too busy and do not have enough time for 'this sort of thing in real life'. While, therefore, they may be prepared to undertake it on a course, they may be both more reluctant and genuinely less able to do so in their real work context.

This is a further reason for saying that the process should be kept simple, that they should be advised to concentrate on a few activities rather than attempt a total review of everything in which they are involved. It is much better that they should keep a learning log for one activity over a period of time, say about a particular meeting they regularly attend, or keep it in relation to one identified learning skill they want to improve, than that they should attempt too much and quickly give up because it seems too daunting.

## Learning log exercise

1. Look back at an experience you have had recently in your work or on a course and answer the following questions about it:

What was the activity/experience?

What did you learn from it?

What plan do you need to carry your learning forward?

2. Now select an activity in which you will be involved in the near future, which provides you with an opportunity to learn.

What is the activity/experience you have earmarked, in advance, as an opportunity to learn?

What, precisely, do you hope to learn from it? What do you need to do to ensure your learning?

3. *After the activity/experience*, answer the following questions about it:

In the event, did the activity/experience differ significantly from what you expected? If so, describe the main differences. What did you learn from the activity/experience?

What plan do you need to carry your learning forward?

4. Now that you have written two learning logs, one retrospectively and the other prospectively, identify the benefits you have gained from keeping a written log.

### Keeping a learning log

As emphasized earlier, learning should not be left to chance. It is best done as a deliberate, conscious process. To aid this we suggest you develop the habit of keeping a learning log. This is an idea that tends to appeal to reflectors but to horrify activists! Fundamentally, learning from experience is a four stage process:

Stage (1) Having an experience (activist); Stage (2) Reviewing the experience (reflector);

Stage (3) Concluding from the experience (theorist); Stage (4) Planning the next steps (pragmatist).

The learning log especially helps you to carry out steps 2, 3 and 4. Keeping a log also helps 'force' you (if that is what it takes) to search out and take learning opportunities since the discipline of making log entries puts a certain amount of pressure on you to have something to enter!

Each time you use your learning log we recommend the following procedure:

- Start by thinking back over the experience and selecting a part of it (a 15 minute period or so) that was significant or important for you.
- Write a detailed account of what happened during that period of the activity. Don't at this stage put any effort into deciding what you learned just concentrate on describing what actually happened.
- Then list the conclusions you have reached as a result of the experience. These are, in effect, your learning points. Don't limit the number and don't worry about the practicality or quality of the points.
- Finally, decide which learning points you want to implement in the future and work out an action plan which covers: What you are going to do? When you are going to do it?

Spell out your action plan as precisely as possible so that you are clear about what you have to do and that it is realistic. You can design your own learning log, of course, but we suggest some paper laid out as follows:

- Write an account of what happened during the period you have chosen as significant and important to you.
- List your conclusions/learning points.
- Write out your action plan.

Now refer to your learning log:

- What are your key learning points from these sessions?
- What implications are there for your department and organization?
- What have you learned that impacts on your current role?

Note down your answers to these questions in your learning log, together with other questions and observations the sessions have generated that are relevant to you, your role and your organization.