

## Can action learning be used anywhere at work?

### Is strategy and learning really the same thing?

There are endless papers and text books that purport to deal with how to devise and implement strategy, but few of the mainstream writers elaborate on the role of people in the process. Instead, they tend to depict strategy execution as a business activity that is rather machine like, with steps and stages that must be followed with clinical efficiency. It is true that of course, large organizations now have hi-tech systems for almost everything - but what about people, widely considered to be the organization's most precious asset? Isn't an organization really just a community of people held together by a shared vision of the future they are creating together? Are people really the only 'malleable' input left? Dixon (1998) observes that the problem for most large institutions is the time lag between a board decision and the mobilizing of the entire company in a new direction. Just drawing up plans can take months.

Our view is that learning is the enabler of strategy, especially when organizational members are able to push forward their own personal and career development by helping to deliver the organization's future. Our aim here is to build on the prospects for engaging people in the relentless change process and to indicate how accredited action learning can be used to maintain balance between personal and organizational outcomes. If the individual is tasked with producing and implementing solutions at work, he / she will naturally want to know how they might benefit. If the organization can show that it has an embedded accreditation framework that can be used to customize and certify learning at work, then most people will readily see the benefit of devoting more of their time, effort and energy to actively working on corporate problems, for here, 'credit' is used to recognize the achievements of managers and, as a currency for learning it can be accumulated and banked in the form of an externally recognized award. But in our scenario, credit is only awarded for outputs or applications and so consciously or not, the associate is in fact, tracking his/her own contributions to the organization's investment in learning.

For organizational learning specialists, the pot of gold at the end of the proverbial rainbow is return on investment: the ability to track the value added by every pound sterling or dollar spent on personal development. It is our view and experience that accredited action learning truly enables this to happen - associates engage because they want to and they work on things that matter to them and to the business - nothing else really matters, if one accepts that the organization itself is beyond doubt, the best business school that any employee will ever attend.

### What brings strategy and learning together?

The case for 'learning' in an organizational sense can be made as a response to phenomena that are genuinely difficult to manage, like globalization, environmental change, discontinuity, uncertainty and complexity. Perhaps the learning organization label became popular because it encompasses many of the qualities deemed necessary to cope with the external world, such as teamwork, participation, flexibility and responsiveness. So why does organizational learning so often fail to ignite? Could it be because missed opportunities and mistakes occur because team members don't dig deeply enough into the basic assumptions guiding their actions? This is usually because 'the way things are done' is part of the organizational fabric - its culture.

Most writers though accept that deeper-level learning arises from critically reflecting on one's own experiences. John Dewey was among the first to write on the subject in the late 1930s. Dewey's view was that 'learning' triggers a reflective thought, beginning with an ambiguous situation that poses some kind of dilemma. From this 'felt difficulty', the individual locates and defines the problem. If logic prevails, the individual next considers solutions, with analysis of the many angles, followed by observation and experimentation and, finally, a decision to act or not on one or more of the possible solutions. If learning gives rise to a change in basic assumptions, it is commonly referred to as 'double-loop learning' in contrast to learning that doesn't challenge underlying assumptions, known as 'single-loop learning'. In essence then, to 'learn something' the associate must consciously experience a cycle of events, which begins when actions (and their results) become experiences and continues as the associate reflects on the experiences (what has been learnt?), then develops, plans and implements new or revised actions taking into account the outcomes of learning from 'doing' and 'reflecting'.

If the locus of learning is in fact, the individual, it prompts the question: Can the organization as an entity or community of interest groups do anything in its own right? In a corporate sense, the results from individual learning must somehow become embedded in the minds of its members, and/or in artefacts such as maps, memories and programs used to codify the outcomes from learning. More specifically, are organizational objectives, capabilities, and memories, meaningful at all if organizations only learn via their current members? The most helpful approach is to focus on the ways in which individuals within organizations learn.

This school of thinking focuses attention on the organizational infrastructure for learning and whether (or not) it actually helps individuals to learn at work.

### So how do we make it happen?

Apart from agreeing that organizational learning is a good thing, there is very little consensus in the management field on what organizational learning actually is. The term appears to be little more than a powerful emotive symbol, like an icon or a flag, which excites commitment in devotees but to which they attribute very different meanings. Is it really little more than 'a good thing'?

Our view is that by engaging the interests and active participation of organizational members in personal learning, the organization can in turn, achieve practically anything it wants to, providing that the collective effort is carefully nurtured and directed. This need not necessarily mean that individuals have to challenge basic assumptions 'en masse' for this misses the point. Each and every associate must find a way of customizing and balancing their own personal learning agenda (by answering their own question: What's in this for me?) along with the expected organizational benefits. Only then will motivated associates begin to strive to find answers to questions that may not have been asked before and to learn from each other. Above all, 'shared learning' is the key to sustaining momentum: It brings behavioural change (as managers try out ideas and approaches used by their colleagues) and helps to maintain double-loop inquiry, as the members of small groups grow to trust and depend on one another. In these circumstances, organizational learning will begin to flourish, and with skilled facilitation, it will develop, as long as managers value the organic networks that allow them to share and compare in a way that suits their own ways of learning at work.

For Peter Senge, an influential writer on organizational learning, the point of all this effort is to continually expand the organization's capacity to create its own future. If this visionary statement is ever to mean anything at all, it means that executives must lead the way and set an example, by encouraging open debate at all levels on tough issues like re-generation and even re-invention - not only when it suits them to do so, but all the time. Here, what Senge calls 'mental models' are important - encouraging every organizational member to surface, challenge, adapt and personally own a mental model of what he or she could achieve by learning at work and thinking about what this might mean for the organization as a whole. For Senge this is one of five 'disciplines' that organizational members need to work on. The other four are personal mastery, building a shared vision, team learning and what Senge calls the 'fifth discipline' systems thinking, which serves to integrate the other four.

Senge's 'five disciplines' were presented as a key to building adaptability in organizations. But are they the critical ones? Senge presents no research evidence for this beyond case studies from his own consulting experience. Instead he attributes organizational learning (and non-learning) primarily to personal attributes of organizational members. Thus organizational learning is equated with individual learning and it is assumed that, if enough organizational members develop an ability to understand how the organization operates as a system, the organization will become more effective. Clearly, improving the effectiveness of individuals is valuable but unless the organization itself systematically captures and builds on individual insight, the organization will not see and feel the benefits. More to the point, unless personal learning is related in some way to the needs and strategy of the business it will be of marginal commercial value. So, is the personal learning of individual organizational members, or even of teams, sufficient by itself to produce enhanced corporate performance? One might conclude that it is helpful to nurture personal competence, but that it is certainly not enough to create and sustain an effective learning organization.

So where does this take us? First, a learning organization should focus on developing its competency to maintain and improve current performance and second, its ability to change or re-shape the organization to underpin future performance. This means that management development is not just about developing individual managers, it should be building the management capability of the organization as a whole. These two aspects of competence development are interrelated but distinctly different. In fact, the development of individual managers must itself become a corporate competence.

**Can we really embed and cascade accredited learning in everything we do?**

The short answer to this question is ‘yes you can!’ All that is required is a willingness to champion the role of learning in operations and strategy execution, sufficient ‘trigger point’ projects for managers and supervisors to work on and a carefully crafted learning design, with appropriate briefings for each output, each in some way related to desired business outcomes. Is it really as simple as this? Well no it isn’t - in our experience, managers tend to share a healthy scepticism for ‘learning’ which in itself is an emotive word. For many it conjures images of irrelevance and even failure, often as far back as primary school and for ‘hands on’ managers, the word ‘learning’ brings to mind other negative connotations. Typically these include preconceptions of many hours spent studying ‘theoretical’ content that has little use or application and examinations that prove little more than information that has been pre-loaded in short term memory can be regurgitated under examination conditions. At worse, this scenario fills would-be associates with horror - in fact, even those who ‘succeeded’ in the mainstream education system - from school through university - rarely speak favourably about their experiences of formal learning. Do managers really have to undergo this kind of ordeal in order to obtain externally recognized qualifications at work? If they do, then few will volunteer - except perhaps those who feel the need to chase paper qualifications to gain promotion.

The vast majority of successful managers are good at ‘doing’ and delivering for their employer and they almost always need convincing that action learning respects the ways in which they like to work. Consider for a moment the following table:

**Table 1: What are executives expected to do?**

Drive for results	Demonstrate a passion to compete against a standard of excellence
Show courage and conviction	‘Live’ personal beliefs and values to ensure the success of the business
Think strategically / innovate	Think constantly about the broader perspective in order to visualize the way forward
Remain curious	Able to ‘read’ and interpret factors that will affect the business and re-align with these
Interpret people	Demonstrate insight into the behaviour and interests of others
Understanding organizations	Able to read and understand the organization and others (customers, suppliers, etc).
Impact and influence others	Able to win others over in order to achieve results and support
Lead to win	Able and willing to inspire a team to achieve overall business objectives
Build capability	Able to recognize and respond to both personal and subordinate learning needs.

Source: Adapted from international competencies for chairman’s list and group resource managers, UK multinational.

Notice first that each and every competency listed in the left-hand column is an ‘active’ one. Second, in this organization, executives are expected to ask questions (remain curious) and build from what works and from the resources around them. In fact, only a questions-driven learning process will allow the busy executive to customize their personal development so that they can demonstrate these competencies.

If the organization has the courage of its convictions and the determination to combine strategy and learning, it is possible to use accreditation and ‘credit accumulation’ to drive both forward at the same time and formalize learning capture to the mutual benefit of the participants and the company. Our experience in applying this approach clearly illustrates this, using several overarching business themes to ‘frame’ the basis for individual and small group project work, each with outputs that will add value to the company’s organizational effort to be the best in its field. Interdependency and collaborative effort is also assured by the specific learning briefs used for each of the three learning designs that underpin this approach. **Exhibit 1** sets out the principles used to allocate credit to any given learning design and enable participants to accumulate credit via the outputs that they produce. As a starting point, the cascade helps to create an ethos of sharing - both in terms of learning and responsibility for delivering the outputs on time and to specification. Beyond the initial work, the business case for embedding the process throughout the company flows from the high return on investment yield that is expected from pilot work with high potential participants.

**References**

Dixon, P. *Futurewise: Six Faces of Global Change*, Harper Collins, London, 1998.

Source: *Accrediting Managers at Work in the 21<sup>st</sup> Century*, Richard Teare & Gordon Prestoungrange, Prestoungrange University Press, 2004.

## EXHIBIT 1: HOW DO OUR MANAGERS ACCUMULATE CREDIT FOR THE WORK THEY DO?

The principles used to allocate credit for outputs are built around five steps. By following these steps, an internal learning specialist team is able to construct a picture (in the form of a 'learning design') of the pathway(s) for any given population of managers. The steps are:

1. *Establish own vision, objectives and priorities for accredited action learning.* In essence, how might we integrate accredited learning with the strategic challenges of the business?
2. *Align the accredited learning categories with the management hierarchy of the organization.* This is important so as to ensure that the level of seniority and responsibility is aligned with the appropriate pathway. For example, Master's level learning should equate to a senior organizational role.
3. *Create learning designs for each category.* The starting point here is: What does this cluster or category of managers actually do and what impact are they expected to have on attaining business goals?
4. *Devise a specification (the learning brief) for each learning design 'output'.* Outputs are the projects that managers write and submit for review and grading, after which credit is awarded. What tasks and projects will each manager actually work on and how should these be translated into a written learning brief?
5. *Implement the learning designs via action learning sets.* Managers working together at the same pace in an action learning set on any given credit track, towards a professional award.

### The principles of credit accumulation

Credit accumulation is linked to three stages of learning:

*Prior learning* - captured via a career review report (supported by a portfolio of related documentation). Up to one third of the credits needed for a professional award can be awarded for prior learning. The logic here is that accelerated learning is best founded upon the associate's own critical evaluation of what they already know - and need to learn next.

*Current learning* - relates to all the opportunities for learning that currently exist in the business (both internally and externally resourced) and up to one third of the credit needed for a given external award (or two thirds if a career review is not undertaken) can be delivered by devising outputs designed to demonstrate the application of learning.

*Future learning* - assumes that the associate's interest and desire to learn has been triggered by prior and/or current learning opportunities and the aim is to carry-forward the learning agenda (by drawing-in 'new' knowledge and experiences) as a basis for personal (and organizational) development. Up to one third of the final credits needed (also referred to as capstone credit) can be achieved in the final stages of any given credit track.