

Combining Business Outcomes and Employee Development:

Action Learning in Action

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Action Learning

- What is it?
- A brief history
- How does it work?
- When shouldn't it be used?
- Preparation/skill building
- Organizational Politics and Action Learning

What is it?

- A real-time learning experience that is carried out with two equally important purposes in mind:
 - meeting an organizational need
 - developing individuals or groups ⁽¹⁾
- Both a process and a powerful program that involves a small group of people solving real problems while at the same time focusing on what they are learning and how their learning can benefit each group member and the organization as a whole ⁽²⁾

1. Rothwell, William J. (1999). *The action learning guidebook*.
2. Marquart, Michael J. (1999). *Action learning in action*.

What is it?

- The process of aligning the structured learning of a development program with the learning needs of participants working on real business initiatives. . .
 - Producing relevant learning that is immediately applied to solving a critical business challenge
 - Ensuring greater retention of learning by participants as well as much higher direct returns on the organization's investment in learning ⁽³⁾

3. Zemke, Susan (2001). *Using action learning to develop leaders and deliver business results*.
Workshop presentation in "Reaping the rewards of action learning." Chicago, October 25

In Sum. . .

- Action learning requires that
 - learning & development take place
 - and-
 - the learning is immediately applied to solve a real business issue

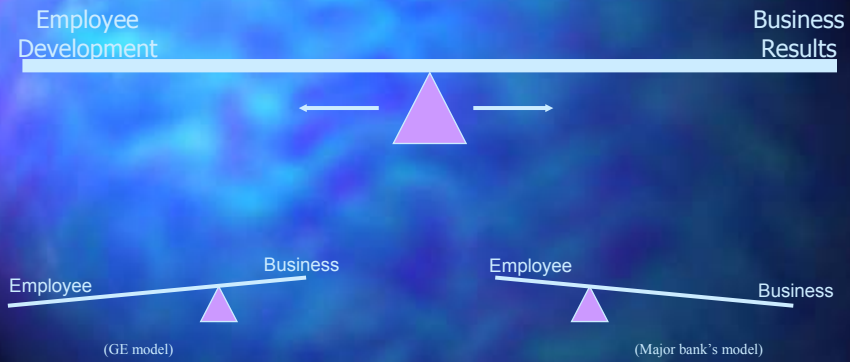
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A little history

- Reg Revans
 - Titanic
 - WWII Coal Mines in England
 - GE
 - British Airways, Lucent Technologies, Motorola, DuPont, Whirlpool, etc.

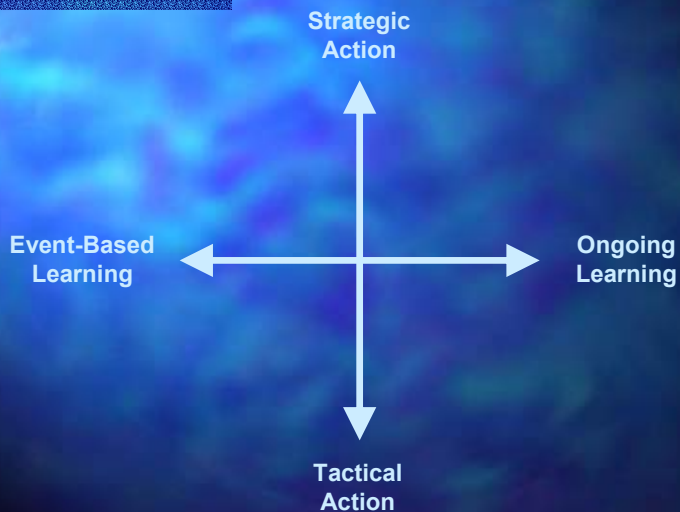
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What's the best balance?



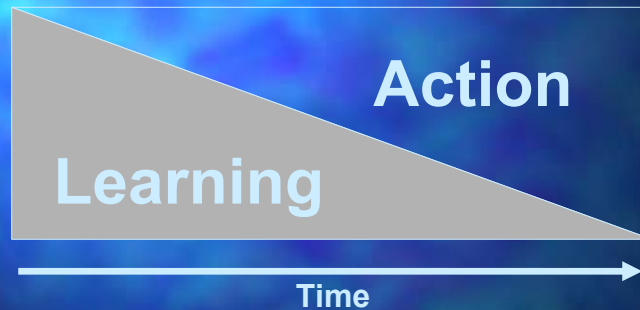
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Let's add a little more complexity. . .



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Load learning at the front-end



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Components & framework

- Sponsor
 - Significant level in organizational hierarchy
 - Understands and embraces action learning as a means for individual, team, and organization development
 - Prepared to work through resistance
- Strategic Mandate
 - Significant business issue or opportunity that cannot be addressed with current processes

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Components & framework

- Roadmap
 - Timeline and milestones that guide the entire process
- Participants
 - Can impact strategic mandate
 - Diversity in background, experience, function, level, competencies
 - Be aware of political issues

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Components & framework

- Coaching/Facilitation
 - Intervenes in and provides feedback on group dynamics, individual behaviors
 - Inside or outside organization
 - Meets with team at various points to act as objective sounding board, etc.
- Orientation/Kick-Off
 - Training component (How do we do this?)
 - Skill development component (presentation skills, team skills)

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Components & framework

- Data Gathering & Analysis
 - Team driven
 - Variety of methods (external benchmarking, literature, internal assessments)
- Draft Presentation
 - Requires understanding and anticipation of organizational constraints, politics
 - May require additional coaching or skill building (presentation skills, etc.)

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Components & framework

- Presentation
 - Goal is to secure commitment from sponsor to act on team's recommendations
 - Includes implementation recommendations
- Senior Management Response
 - Decision on action
 - Recognition of team performance
 - May require coaching for senior team on how to react to presentation (presentation not the quality they wanted, not the focus, no longer an interesting topic, decision has already been made)

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Components & framework

- Reflection
 - Focus on individual and team learning
- Celebration
 - Formal disbanding of team
 - Formal recognition of work, learning, outcomes
- Sharing
 - Disseminating what was learned across organization

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Success & risk factors

- | | |
|---|---|
| <ul style="list-style-type: none">■ Success Factors<ul style="list-style-type: none">– Clear expectations– Clear objectives– Review process– Doable time frame– Sense of identity– Regular meetings– Variety of media and communications– Someone on team has expertise *– Project is a recognized priority– Clear team leader– Coaches | <ul style="list-style-type: none">■ Risk Factors<ul style="list-style-type: none">– Fuzzy expectations– Unclear metrics– No accountability– No sense of urgency– Unhealthy group dynamics– Low commitment– Multi-location excuse– No expert on team*– Not "real work"– Powerless leadership– No coach |
|---|---|

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Hints

- Identify projects that will have 60-70% probability of successful completion
- Make it a two-tiered developmental opportunity by having participants identify challenging assignments for their direct reports (to free participants' time)

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Geographically-dispersed teams

- Initial/kickoff meeting takes on increased importance
- Local coach available
- Enhanced emphasis on team process
- What can be done individually, and what does the team have to do as a team?
- How is feedback given?
- What needs to occur when the team is physically together?

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Champion--role & tasks

- Role:
The ambassador for action learning projects in the organization
- involved with creating and maintaining buy in amongst all stakeholders.
- Tasks:
 - Conducts Action Learning Project briefing for senior team
 - Selects and briefs sponsors
 - Makes final selection of projects
 - Launches Action Learning Project process with participants
 - Attends project presentations
 - Monitors follow up on recommendations resulting from project work

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Sponsor--role & tasks

- Role:
Sponsors are responsible for nomination of projects, providing guidance and support to their project teams and conducting implementation of any recommendations resulting from the Action Learning Project work.
- Tasks:
 - Attends Action Learning Project briefing
 - Nominates project
 - Provides Project Briefing Packet
 - Attends Project Launch
 - Creates organizational support for project team
 - Helps overcome organizational obstacles
 - Meets with team periodically and provides guidance to project team
 - Meets with team coach at start and end of project
 - Participates at project presentation
 - Commits to follow up on team recommendations

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Coach--role & tasks

- Role:

Coaches work with the project team to provide observations and suggestions regarding:

- team processes
- team behavior and effectiveness
- opportunities to apply tools

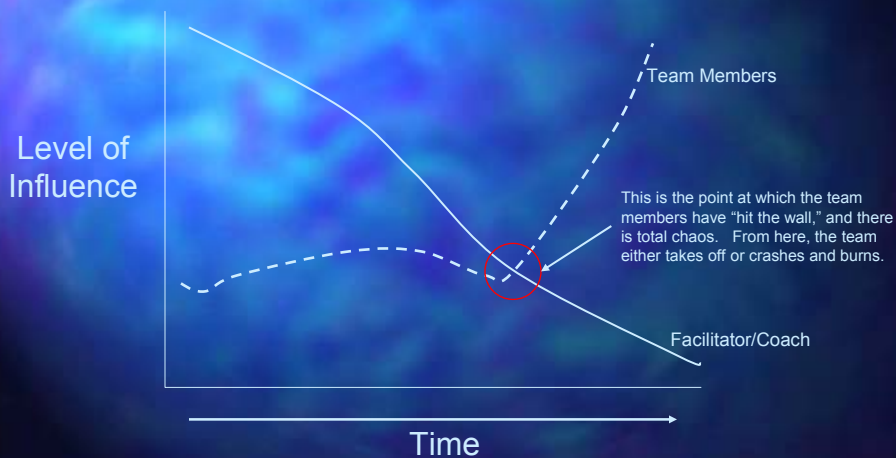
*Coaches also communicate with sponsors and can contract to coach the sponsor on his/her role.

- Tasks:

- Connects with Sponsor before Project Launch
- Coaches team at Project Launch
- Meets with team periodically - provides guidance and coaching
- Meets with sponsor at the end of the project, prior to project presentations
- Attends project presentation

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Hitting the wall--or the importance of a strong coach

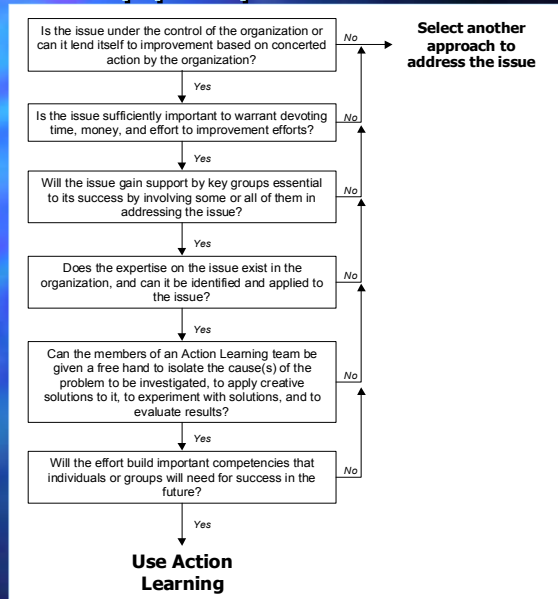


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What makes an appropriate project?

(or, when not to use Action Learning)

From: Rothwell, W.J. (1999). *The action learning guidebook*. San Francisco: Jossey-Bass/Pfeiffer.



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Some examples

- Strategy for entering Eastern-European communication markets
 - Motorola
- Building a succession planning system
 - American Century Investments
- Redesign pilot training curriculum
 - Delta Airlines

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Some Oxy examples

- North American natural gas strategy
- Peer review/post audit/knowledge sharing
- Demographic shift

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Preparation/skill building

- Team skills
- Virtual team skills
- Scenario thinking/planning
- Breakthrough thinking
- Mental models
- Problem solving
- Project management

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Learning by doing

- Skinner: The major difference between rats and people is that rats learn from experience.



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Politics

- Project sponsor
- Participants
- Freeing time for the project
- Senior management response to presentations
- Implementation resources

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Some resources

- Rothwell, W.J. (1999). The action learning guidebook. San Francisco: Jossey-Bass.
- Marquardt, M.J. (1999). Action learning in action. Palo Alto, CA: Davis-Black.
- Raelin, J.A. (2000). Work-based learning. Upper Saddle River, NJ: Prentice Hall.
- Dotlich, D.L. & Noel, J.L. (1998). Action learning. San Francisco: Jossey-Bass