Action Learning
A Strategic Intervention, Not a Classroom Exercise
by John Hendrickson

10 BEST PRACTICES THAT YIELD BIG RESULTS

Action learning may be the most talked about yet least consistently applied development intervention of all time. For example, the “father” of action learning, Reginald Revans, believed strongly that coaches should not be involved in the action learning process, lest they disrupt or overly influence the learning process of group members. By contrast, contemporary psychologists like Michael Marquardt contend that without a skilled coach or facilitator, a self-managed group may never make the time for discovery and reflection.

Similar debates have erupted over the importance of transferring the project learning to the host organization and the choice of cognitive frameworks to evaluate the acquisition of skills and knowledge. Moreover, in some organizations, the very term “action learning” is used to describe everything from post-classroom follow-up to sophisticated organization effectiveness interventions. No wonder there is debate on the merits of action learning; we can hardly agree on what it is.

Regardless of the controversy over its core components — the coach, the challenge, the group, and the transfer of learning — here is an updated look at 10 action learning best practices that are yielding big results for our clients.
Transform action learning “challenges” into action learning “projects”

It is important to turn broadly-cast action learning challenges into formal action learning projects as soon as possible. If the challenge does not become a formal project, the outcome risks becoming little more than a set of flip-chart recommendations. In this scenario, action learning devolves into a high-stakes academic debate rather than being a true test of leadership.

To be an effective measure of leadership capability, action learning projects need implementation plans or, at the minimum, a pilot test. The process of implementation challenges “action learners” to influence change and gain the buy-in of reluctant colleagues and leaders. It creates “aha” moments for individuals who may have high analytical skills but comparatively lower EQ.

Compelling and implementable action learning projects also tend to have a more meaningful scope. If the challenge is modest or restricted to a function or department, there will be little opportunity to test the participant’s ability to work with teams having different challenges, backgrounds, and domain expertise. Small scope leads to small results; projects that create tension because of their scale bring out the best and worst of our emerging leaders and become more provocative as learning experiences. Additionally, if the team knows that the projects are significant enough to be implemented and lead to real business results, the enthusiasm and commitment behind their efforts will be doubled.

Visible sponsorship is an essential requirement for the project to be taken seriously by the organization and the team. One can debate whether the action learning “go” or “no go” decision should be made by an individual or the people in the program, but it is clear that someone needs to have skin in the game as well as the financial and political clout to implement the solution. Ideally, the decision maker should have instant credibility and the inclination to look at the project from both a business and a learning perspective.

Working with an executive sponsor in an action learning context mimics the dynamics of interacting with senior leaders in real life. Team members will be challenged to build a strong enough business case to warrant the investment of time and resources that also appeals to the sponsor’s unique needs and style as much as his or her business sensibilities.

Don’t move forward without executive sponsorship

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The genius of action learning is that participants who have difficulty “managing up” on their jobs will invariably face similar challenges in their action learning assignments. The difference is that those mistakes, with the help of skilled coaches, colleagues, and sponsors, will lead to lessons learned.

3 Balance the “action” with the “learning”

The appeal of action learning is quite different for business executives than for human resources professionals. Leaders tend to be more interested in project results while trainers and I/O psychologists tend to focus on the insight and behavioral breakthroughs that action learning can spark. The goal of action learning should be results that meet the needs of all parties.

To make that happen, it is important to “force the process” around reflection and learning. The visibility and weight of the project will create momentum within the team for achieving business results. However, without the forceful intervention of a coach or team process, reflection and learning is much less likely to happen.

Coaches should schedule periodic time outs to address the dynamics of the team and how the business results are being achieved. If funding makes it difficult for coaches to participate in the action learning, a team agenda must be established that includes reflection and an examination of group process. In this situation, the teams operate like business or law school study teams, who not only split up the academic load but also address group process.

4 Measure both the learning and the results

Action learning projects are uniquely positioned to realize a return on investment. Because they should be expressly designed to produce not only behavioral change but also business impact, the quantifiable value they achieve can only be compromised by poor measurement practices.

Central to any evaluation design is pre-intervention measurement. Before jumping to conclusions regarding the impact on the business and learner, the organization should establish the baseline performance for the individual and the project. Then, and only then, can we begin
Another typical flaw is taking credit for project success or individual growth without acknowledging the other variables in play. Projects don’t succeed exclusively on the strength of an idea or a group of individuals. Similarly, individuals don’t grow just because they have had an “unfreezing” moment and good coaching. Identify the other factors that played a role — environmental readiness, individual motivation — and take contributory (not exclusive) credit for the success.

### 5. Leverage the value of action learning outside the classroom

Action learning is widely used in training programs but is almost certainly underutilized as a tool for research, problem solving, and strategy. Interestingly enough, there is considerable academic history behind the practice. As early as the 1940s, Kurt Lewin used “action research” to describe “a spiral of steps, each of which is composed of a circle of planning, action, and fact-finding about the result of the action.” By mid-century, Chris Argyris applied “action science” to study how people behave and learn in challenging situations.

Unfortunately, the fascination with action learning has been largely confined to graduate school classrooms and the training functions of human resources departments. Nevertheless, we have recently seen examples of companies using action learning to simultaneously study strategic business choices and learn something about the people who are leading these efforts.

Simply stated, the approach calls for executive teams to identify a critical choice or project that flows right out of the organization’s strategic plan and then assemble a group of leaders with diverse skills and backgrounds to tackle it. These efforts typically take place as part of the strategic planning process. However, by adding internal or external consultants to the team to help process the learning as well as optimize the decision, the value to the learner is increased.
What do CEOs and board members want to know about candidates for key succession jobs? Answer: Observable, objective data on their capabilities. What do they have now? Answer: Ambiguous assessments that are rarely predictive of potential and are likely to feel arbitrary to the candidates themselves.

Action learning provides the opportunity for the CEO, C-suite, and board members to see senior leaders in action rather than as a data points. The obvious opportunity for visibility is in the final presentation of the results of the action learning project. When done well, the final presentation can look like a venture capital pitch with the same requirement for a concise and compelling business case.

Additionally, having the CEO or other executive sponsors drop in on team meetings or engage in 1:1 conversations with participants and coaches provides a line of sight to candidates and their abilities. This hands-on approach gives a comparative view of leaders who may seem equal on paper but perhaps quite different when seen through the lens of leadership in real time.

Coaches cost money and add expense to the action learning budget. What, then, are the cost/benefits of including them in program design? We know that they can prompt feedback and reflection on individual leadership practices, but they also can help a team manage itself and surface systemic organizational issues without formally intervening and taking control of the group.

For example, in a recent program, we observed a team that “divvied up the work” of the action learning project as effectively as possible — or at least that was what they thought. The challenge was to improve the operational efficiency of a plant located in the United States with a global team of leaders. The American members of the team had the greatest proximity to the site and the deepest technical knowledge, while the European members, who faced similar challenges with their operations, had broader management skills, but less formal engineering training.
The Americans immediately jumped on a potential site visit and an examination of operational statistics. The Europeans were relegated to planning the project and structuring the final presentation.

When the coach asked how well everyone was being utilized, the Europeans exploded and said that this situation mirrored the real-life challenge of being marginalized on operational problems that crossed continents. The simple coaching question of utilization completely changed the dynamic of the team and led to productive conversations that extended beyond the context of the project — not to mention providing some key learning on leadership and project management among all involved.

It’s not enough to assemble teams with a diverse set of skills, experiences, and locations. The lessons of diversity apply to action learning as well. It is important to not only assign a diverse group of people to teams but also to ensure that they are enfranchised in the team’s decision making and have learning opportunities that extend beyond their functional areas of expertise.

Program leaders typically implore participants in action learning teams to focus on adding new competencies rather than relying on their existing skills. However, what we often see is the finance professional being the “numbers person” on the project, the participant from outside the US “owning” the global perspective, and the most charismatic member of the team taking the lead in the final presentation.

What does that prove? It reinforces what we already know about each individual’s capabilities. The coach or program director should jump on opportunities to challenge participants to act “out of role” and realize the true value of diversity — multiple perspectives contributing to a more effective outcome while growing their own leadership abilities.

The side benefit of every training program is the opportunity to network with others within and across functions. Even colleagues who may see each other every day acknowledge that the classroom experience motivates them to build deeper relationships with people they already know; the value of networking becomes even greater for less frequently seen colleagues.

Make diversity a feature, not a constraint

Incorporate purposeful networking into program design
Networking can be “designed in” to the definition and scope of action learning projects. By making cross-functional interaction a project requirement, team members are formally challenged to influence organizational stakeholders such as IT, finance, and HR. With a little creativity, that buy-in activity can also be extended across different parts of the business.

For example, an action learning project designed to add or update a service or product in one area of the business could be repositioned to include features that require partnering across business or customer segments, thereby necessitating collaboration and often-challenging conversations. The trick is to make the action learning projects real, not fantasy ideas. By making them real, interactions across the business will be inevitable and contribute to the goal of purposeful networking.

Executive teams typically make up the review committee for final action learning presentations. This seems like a natural fit, given their responsibility for investment decisions. However, if they are not prompted to do so, senior leaders may neglect to ask about how the groups arrived at their recommendations. They will naturally press the teams for the business logic behind their proposals but not necessarily probe group dynamics, leadership skills, or developmental insights.

The best practice here is to offer executives a few simple questions that target the process as much as the results. Probes such as, “Tell me about how responsibilities were allocated on the project,” “Give me an example of how you addressed conflict or differences in opinion on your approach,” and “What did you take away from this experience?” are examples. These questions will set up an interesting exchange between participants and executives that will give them a great additional opportunity to “teach” leadership.

We have found that leader lead education is a powerful concept and especially relevant in action learning. For leaders, it not only provides the opportunity to mentor the next generation but also adds local context to big leadership concepts like strategy, execution, and talent management. For learners, it presents their executive team in a venue in which they are encouraged to ask questions rather than simply providing answers.
About the Author

John Hendrickson is a partner at Cambria Consulting, Inc. He is a consultant and executive coach with significant experience designing and implementing leadership and talent management programs inside Fortune 500 companies and the public sector. He has worked with Albemarle, Aon Hewitt, Cisco, Intel, OPM, Texas Instruments, and other prominent organizations to develop action learning programs that deliver results for the organization and measurable professional development for employees.

He is a quick study of the uniqueness of a given industry or culture and adapts best talent management practices to fit the situation and business challenge. He has executive coaching experience at the CEO, C-suite, and senior leadership levels and is a passionate believer in the potential of business professionals to accelerate their careers with practical yet inventive developmental plans.

You can read more about action learning in John’s most recent article “Leadership Solutions or Point Products” in the December 2010 edition of the Chief Learning Officer (CLO) magazine.

About Cambria Consulting, Inc.

Cambria Consulting has been a pioneer in the field of talent management. Founded in 1985, Cambria has helped organization’s design leadership and functional training programs that promote higher order learning (Bloom) and achieve Level 3/4 impact (Kirkpatrick). This experience has influenced their approach to professional development and action learning, reinforcing the need for contextual education and blend learning solutions.