

# Fundamentals of action learning

In the first of a four-part series, **Dr Richard Hale** looks at the origins of action learning and its role in organisational success

**M**any learning and development professionals are quick to explain when I mention my interest in action learning, that they 'know it', often framing action learning as a training method they have in their kit bag alongside a host of other techniques. I am not sure action learning was intended by its founder, Professor Reg Revans, to be a training method as such.

His summary proposition is widely known – that significant learning (L) is best considered as a combination of programmed instruction or knowledge (P) combined with insightful questions (Q) generated in groups known as action learning sets. The  $L=P+Q$  equation may be widely quoted but is often misunderstood particularly if you accept that true understanding comes from doing it rather than simply being able to quote it. We would do well to subject ourselves to scrutiny in considering our own cleverness borne out of knowledge and wisdom borne out of experience as action learning practitioners.

For trainers whose key performance indicators relate to measurable inputs such as training days delivered, the challenge they often face is to actually identify the contribution they are making to the business and its purpose. Revans never saw the action learning set activity as the main purpose of action learning. However, it might

have helped our understanding had he made the requirement for action and learning outside of the learning set explicit in his equation.

Trainers claiming to facilitate action learning often focus disproportionately on individual learning over and above *organisational* learning. A look back at the key action learning projects Revans worked on shows us that he was concerned first and foremost with providing a system to support organisational development and innovation, usually with an eye on a higher purpose.

- In the coalmines, when the industry was on its knees post World War 2, he was concerned with improving productivity in order to contribute to the national economy.
- The Hospital Internal Communication Project in the 1960s integrated detailed measurement of problems and improvements following action learning interventions – this concerned, for instance, length of patient stay, nurse turnover and speed of recovery from illness.
- With the General Electric Company, action learning contributed to gaining major international contracts in the face of global competition.
- In the Australian government, he was concerned to reduce bureaucracy and improve effectiveness.
- In Nigeria, action learning projects were concerned with saving palm oil production in remote villages to support the livelihood of locals.
- In Belgium, with the Inter-



University Programme, he was concerned with helping the national economy recover from a national crisis.

Linking most, if not all, of his projects was the theme of organisational crisis or opportunity and situations where no one person had the answers regarding what to do next. Revans was concerned with organisational development before OD had developed as a field of practice and he viewed organisations as systems before systems theory had entered the management lexicon.

These business challenges lent themselves to treatment by action learning. They were not straightforward puzzles which could be treated by training courses. Courses are fine where we are concerned with developing knowledge or skills to make up for known deficits. Providing training, for instance in compliance in order to stay legal or safe, is clearly important, but it is not too difficult to design, deliver or buy-in such training. Established models of training needs analysis, course design, delivery and evaluation at reactions and skills development level work well for such requirements. Trainers have for some time enjoyed developing methods of instruction driven by the need to provide known solutions to known puzzles. For trainers with a liking for predictability and consistency, this is a satisfying way of working. Equally for the frustrated Thespians who enjoy the accolades for providing good entertainment, there are some personal rewards that come from dressing your training up with ice-breakers, games and competitions.

It is more of a challenge though to take an organisationally-driven approach which supports

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the learning of individuals and teams who have to address some of the challenges of looming crisis or need to seize the opportunities for future growth. Contributing at a strategic level can be truly rewarding. For those with a tolerance for ambiguity, uncertainty and change this can be a thrilling way to work and one which demands action learning.

*So, why action learning?*

Because there are big business-driven problems to address where no one has the answers.

Because there are opportunities to be seized but a lack of clarity regarding how to exploit them.

Because if we don't tackle these problems we may not be in business in the future.

Such problems are:

Action Learning Is...	Action Learning is not...
Evidence based and grounded in a proven theoretical practice based discipline.	A catchphrase, gimmick or product.
A way of thinking about learning – an epistemology.	Simply a training method or technique, let alone a fixed method of questioning.
Organisational and business driven.	Competency driven. Individual and behavioural competencies will develop as a consequence of good action learning but their development is not the primary purpose of action learning.
To meet the needs of a 'client'. The client may be an individual or an organisation.	About individual or group therapy.
For tackling 'here and now' problems.	Intellectual solving of old case studies.
Action focused.	Classroom based intellectualising.
Learning focused – at individual, team and organisational levels.	Training or trainer focused.



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- Critical to address in order to secure the future of the organisation
- Likely to provide an effective means of innovation
- Not being addressed through business as usual or project management systems (project management rather than action learning is appropriate when it is known that it is possible to manage a way through more 'tame' problems)
- Likely to benefit from consideration by people from diverse perspectives and functions - and create a vehicle for breaking down a silo culture.

#### What Action Learning is (and is not)

When I meet a new group interested in action learning, I ask the audience about their prior experience of action learning in order to surface what version they have experienced either as participants or facilitators. Most refer to 'personal development' driven action learning. This includes:

- Programmes where a particular population in a talent pool is asked to tackle a work-based project in order to be able to demonstrate certain competencies.
- Leadership development programmes where the follow-up to the off-job workshops is a period of action, with a view to the group meeting again as a learning set to find out what has happened.
- Action learning sessions built into an off-job course and mixed in with other methods more concerned with training than learning.
- Non-directive group problem solving.
- Groups formed as a pressure valve to give psycho-social support amongst members – *the group hug*.



The drive for such initiatives typically starts in the HR or learning and development function, not from the top of the business. Some report positive experiences of what they call action learning and some say that the initiatives petered out due to lack of *bite* within the business.

I prefer to see action learning as a mind-set, a philosophy or a way of being which has certain principles which may be evidenced by the application of tools or techniques.

#### Where is the focus and locus of learning?

Traditionally the *focus* for learning in the industrial economy was on the trainer as the expert imparting knowledge or skills to the trainee or learner. The apprentice learned craft skills first off-the-job in the relative safety of the apprentice training school, before serving time learning from the skilled man or woman by observation with little say in terms of what was being taught. The curriculum was predetermined and, save prerequisite school-based qualifications, the trainee was seen as *tabula rasa*.

At the executive level in the industrial economy, the business school model of repeatedly teaching case studies from the past and smart management methods to solve complex intellectual problems predominated. Here too, the *focus* of the learning was on experts and gurus who were themselves judged by their published case studies or accounts of past work. The *locus* of learning was seen largely as the classroom or conference hall where the *focus* was on the single person standing at the front and more on the past than the present or future. Entire qualifications could be achieved without the need to demonstrate management, let alone leadership, in the workplace. This was particularly the case at the top global business schools which were feeding blue-chip corporates with intellectually qualified leaders.

More modern perspectives recognise the need to challenge the idea of the main *focus* and *locus* as being away from the workplace. Revans said that when we face an accelerating rate of change, looking back at the case studies of the past serves a limited purpose. Insightful questioning and collaborative learning become more important as a means of moving into the future, while drawing in part on past experience. His *focus* was forward and the *locus* of learning was the place of work and the workers, not the classroom and the instructor. Yes, most of his work was conducted in what might be seen as the industrial era. However, as a scientist working with Ernest Rutherford at the Cavendish laboratories, with occasional visits from Einstein, these leading atomic physicists of the →

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day were trying to understand matter and matters that had not been understood before. It called for a courageous action learning mind-set for Nobel prize winners to accept they were united in their ignorance, but ultimately the major breakthroughs came through collaboration.

Revans was ambivalent about the place of the facilitator in action learning and he was openly dismissive of the place of the 'expert' in providing action learning for others. He was specifically critical of notions of psychotherapy or reliance on therapists in action learning and he dismissed the relevance of self-appointed 'experts' in being human and genuine. He felt ordinary people could help

each other; the *focus* should be on the learner not the facilitator, trainer or teacher.

So it is interesting in this post-industrial era to now see the recognition of the importance of social learning in such research based concepts as communities of practice and network learning. The ideas of 'flipped classrooms', where real work challenges are discussed rather than lectures delivered and Massive Open Online Courses (MOOCs) where content, or the 'P' in the Revans formula, is delivered using web technology to hundreds or thousands of people at a time, and business school curricula being offered online for free, are all a post-modern reality.



### Focus and locus for action learning

I propose that a useful construct when considering the design and delivery of action learning-based initiatives in organisations is to see three aspects of *locus* and *focus* for learning where *locus* is the place or location of the learning and *focus* is what we should pay attention to. These aspects are organisation, set and self.

These are all inter-related:

- the self works in the organisation and the set,
- the set is an organisation comprising individuals and
- the organisation will be impacted by individuals and by proxy, the set.

The popular proposition of the 70 (workplace), 20 (social), 10 (formal) learning balance in programme design (Jennings) has clearly caught the imagination of the training community. However, this model places action learning in the social learning category, reflecting a common misunderstanding of the Revans epistemological position. Revans is clear in stating that learning occurs in the workplace and through the use of formal learning (his 'P' for Programmed Knowledge) as well as through insightful questioning. Insightful questions are not context- or locus-dependent, they can be asked of oneself, in a learning set and in the workplace.

### Focus and locus for learning – organisation

When considering a real 'here and now' organisational challenge, the place where much of the action and learning occurs is in the workplace as distinct from the classroom. The challenge is to make such learning explicit and potentially usable in the future for the benefit of the individual and, ideally, the organisation. Without collaborative discussion about what has been learnt and how it has been learnt (via the action learning set), such learning is likely to remain buried amidst the noise of action. The pursuit by trainers of 'transfer of learning' (from the classroom to the workplace) is a red herring. We should recognise much of the learning is happening in the workplace and consider how we can support, articulate, translate and transfer it into the future and across the organisation. In order to focus on the organisation (as the *locus*) of learning, it is important to frame the terms of reference of the action learning question or project on a real business issue.

### Focus and locus for learning – set

The place where organisational actions and consequences can meaningfully be discussed is the action learning set, the group of *comrades*



in adversity who should help others to review, analyse and plan their actions. Key is the idea that managers are likely to listen to, and act on, mutually negotiated discussion with respected peers. The set is not simply for discussion of feelings but for working with the reality of what participants are seeking to achieve outside of the set.

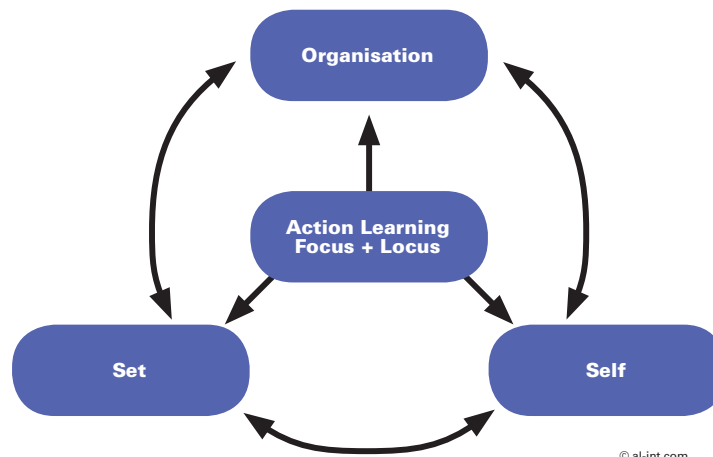
Furthermore, the action learning set is itself an organisation. It may be an organisation within an organisation or spanning across several organisations, but there is no doubt the set is itself a real growing, thriving, dynamic, social-psychological organisation. As such, it provides a basis for rich study of how organisations function or dysfunction. It is a weak response when the set hits the buffers, as it inevitably will at some point, to say: *“Ah well, it is only a learning set. It is not the real world.”*

#### Focus and locus for learning – self

Revans asserted that the social nature of action learning provides a means for individuals to consider the changes occurring within themselves. He also noted that the ability to arrive at personal insights (deep-level learning) may be impeded by one's self-image and need for self-preservation. So the action learning set provides a place where members may be challenged by other set members and questioned, prompted and provoked regarding their own thinking, feelings and behaviour. Of course it takes a good level of trust for this to occur, and establishing such trust is a critical part of the psychological contract or agreement which should be established in a learning set from the start. Learning set meetings should begin by asking individuals to report what they have done and learnt since the previous meeting and should conclude by asking them what they are going to do.

#### Construction sector case study

I have recently been supporting an action learning programme which has been introduced to a construction organisation providing sub-contracted building services to prime contractors in residential and commercial sectors. With a history of success over a 100-year period, this business is headquartered in the Midlands and prides itself on the loyalty of its people and its customers and its reliability in delivering on its promise to customers and suppliers. Having survived the global financial crisis through prudent management and leadership, this business finds itself faced with the exciting prospect of significant growth through the acquisition of new contracts which could see the sales turnover double within a five-year period. Nationally, there is pressure to build more properties for an increasing and ageing population.



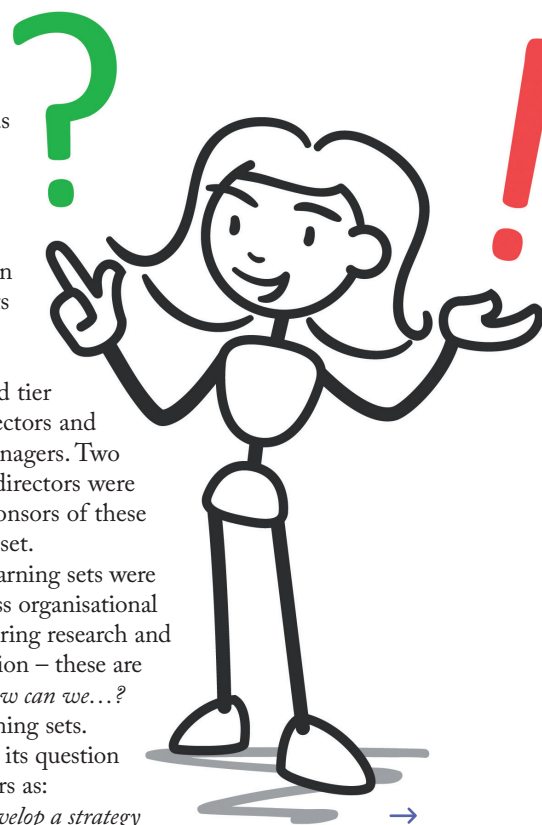
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Additionally, much of the opportunity appears to be focused on London and the South East, which presents challenges and pressures from those in the business who feel it should not lose its regional identity. Discussion with the managing director revealed there were certain business challenges he did not have the answer to and opportunities which required strategic exploration. Also, there was a serious risk that too rapid or unplanned growth could jeopardise profitability.

It was agreed that taking an action learning approach could provide a great opportunity for simultaneous leadership and business development. Two cross-functional action learning projects were formed comprising a newly-promoted tier of associate directors and experienced managers. Two executive level directors were identified as sponsors of these action learning sets.

The action learning sets were clearly to address organisational challenges requiring research and collective attention – these are what I call a *How can we...?* type action learning sets. One set formed its question with stakeholders as:

*“How can we develop a strategy*



to open up other market sectors as the business focuses on growth?" The other learning set addressed the question: "How can we ensure we are structured and resourced effectively for growth?" The focus was on the business issue and supporting the set members to enable them to gain the problem solving and research skills as well as the confidence to apply them.

At the final presentation of the action learning project teams to the executive board, it was clear that individuals had realised there was a need to raise their level of thinking and analysis of business problems. Of benefit to the participants and the business was a recognition that the answer to such business challenges does not lie in the head of the leader at the top, nor is there one definite solution. Through this action learning process, the business had developed internal research capability among managers who, hitherto had seen themselves mainly as technical, professional or administrative contributors. Presented with the challenges facing the organisation, they raised their game. Set members consulted external agencies and organisations, collected and analysed industry data and made specific recommendations for the growth and resourcing of the business.

Over a period of four months, the learning sets worked on their business projects. They were provided with frameworks from facilitators to support self-reflection on their team working and personal and team learning. They were also introduced to group problem-solving and decision-making tools and then immediately applied them to the real business challenge. Faced with the requirement, as Revans noted, to put themselves at personal risk, set members overcame crises of confidence and in some cases the sense that 'this is all over my head'. In the process they united as a team, forming cross-functional relationships that are set to continue long beyond the lifetime of the learning set and its initial project.

Unexpected immediate business benefits were reported including, for instance, listing on new sector bid lists, formation of new external business relationships and identification of beneficial external information resources. Some proposals led to the identification of areas for further research and further potential projects were identified.

It was also recognised that the auto-therapeutic approach inherent in action learning had created a commitment to action among the organisation's own people. Another unanticipated benefit was the learning of the project sponsors. These senior level directors were able to test their own ability to empower, coach and mentor individuals and teams. By candidly demonstrating their own

vulnerabilities and by exposing themselves to risk (*What if the set recommends something I would not have recommended?*), they earned the respect of the set members. The organisation created a healthy climate for what Revans called the 'upward communication of doubt rather than playing the game of the 'downward communication of certainty' when faced with 'wicked' problems. **TJ**

*Richard Hale will return next month with a look at the action learning facilitator as a mobiliser.*

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