Fundamentals of action learning

In the second of a four-part series on action learning, **Dr Richard Hale** explores knowledge mapping

If you are facilitating an action learning process which is business-driven, you are likely to want to support action learning project members by encouraging them to discuss what the fundamental business challenge or question (Q) is that needs to be addressed. So you and they are leading with questions.

This does not, however, mean that the place of programmed knowledge (P) is subjugated in value beneath the question. Reg Revans made the point that programmed knowledge is mainly of use in the action learning process in helping us understand what has been discovered in order to address problems that have been tackled in the past. This can be highly valuable in providing clues about how one might deal with similar challenges in the here and now.

Furthermore, the collaborative nature of action learning, where you learn with and from others by addressing real problems, means that participants in action learning gain immediate access to the understanding of how other action learning set members see the world. Each learning set member will have a unique perspective and way of looking at problems based on their interests, professional background, experiences and strengths. This should be seen as a real intellectual asset which can inform the research around a business challenge – and ultimately informs the actions taken in order to bring about improvement relative to the current situation. Action learning is not actually about solving problems per se, it is about bringing about improvement of challenging business situations.

To use a metaphor that has helped when facilitating action learning programmes let us consider the concepts of 'sky', 'ground' and 'underground'.

On the 'ground' managers, leaders and professionals all face business, organisational or project challenges. In action learning terms, these are problems rather than puzzles, meaning they are multi-faceted, complex and without an obvious or single solution. Such a problem could be, for instance, how to improve customer satisfaction, how to improve safe behaviour, how to reduce waste or how to motivate a dysfunctional team.

In the 'sky' there are many bodies of knowledge and sources of ideas regarding how such problems might be tackled. Such programmed knowledge (P) may appear in the form of publications, professional papers, theoretical frameworks, subject matter experts and academic research. Such knowledge does not always appear in a tightly defined package of solutions to the ground-based action learning problem. However, if you look hard enough and apply some tenacious research skills, the 'sky' can provide a great source of guidance regarding how to tackle ground-based problems and even regarding how to manage the forces at play underground.

'Underground' are other factors that should not be ignored for those seeking to bring about effective change in addressing an organisational challenge, which is surely the purpose of an action learning initiative. Included here are factors such as organisational politics, power dynamics and the values of individuals and organisations. These factors may be hidden but represent powerful forces as they influence the behaviours of individuals, teams and organisations on the ground. To ignore them and assume that problems can be resolved through logical application of professional skills or by technical problem-solving methods alone is wishful thinking.

There are, however, some challenges in conducting 'sky' research through action learning:

- You do not know what you do not know
- Where should you start your research?

→

How can we work with programmed knowledge (P) in an action learning context?

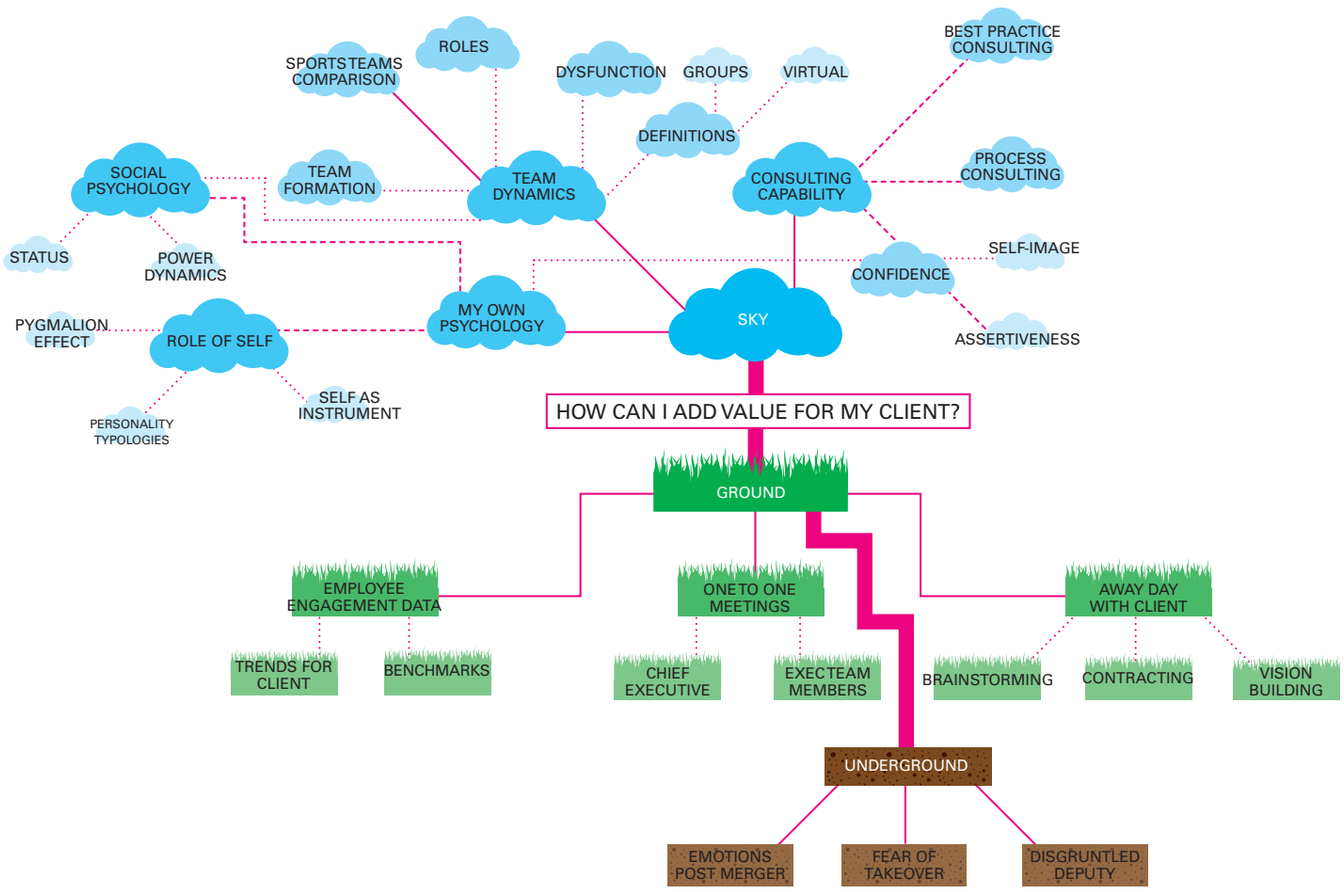
From my own experience of delivering action learning programmes, I have evolved a practical process to support investigation of existing knowledge related to the real world business challenges that action learners face. This is known as 'knowledge mapping'. This works somewhat like mind-mapping but it is actually a distinctive approach with recommended key steps in the process. It is essential that it is conducted collaboratively, usually but not exclusively within the action learning set, in order to provide access to the knowledge of others about relevant knowledge and where to find it. So it is concerned with 'knowledge about knowledge'.

A visual mind-map is created by the problem holder who draws on ideas from set members about sources of knowledge:

- In the 'sky' (external research, publications, experts or other organisations)
- On the 'ground' (organisational contacts or data)
- 'Underground' (about politics, influence, culture, values).

A comment made when I presented this approach to a group of action learning advocates recently was that this was not really action learning. "Why not?" I asked. "Because when you give your own ideas about where the problem holder might find relevant knowledge you are being directive and telling them what to do which is not action learning." Not so in my view. Back to Revans who was always keen to stress the value of looking to others outside of one's own organisational context for ideas and who, not surprisingly given his career as a physicist, valued data analysis highly and of course recognised the value of learning 'with and from others'.

Knowledge mapping



Knowledge mapping model

One can, indeed should, contribute to another person's knowledge map to help them decide how they will navigate the map and to decide where to go and where not to go, while recognising the reality of their time and resource constraints. The problem holder retains ultimate responsibility for what he or she does or researches and in this sense remains self-directed. Self-directed does not have to mean self-restricted.

In the action learning programmes I support, knowledge mapping has been put to good effect leading to purposeful research and insights that have in turn led to deliberate and conscious action. This may not have been the case had individuals tackled their problems as lone-rangers, working on instinct alone with their limited personal mental map of the knowledge relating to their question.

Key steps in knowledge mapping

1. Define your questions

Define your question by reference to your key stakeholders. Recognise that different stakeholders may define success differently and you need to reconcile these differences and decide on the criteria for success. How will you be able to demonstrate added value for yourself and the business by successfully tackling the question?

2. Start with the knowledge map already in your head

Although you may not yet have expressed it, you already have a mental map of the subject area you are investigating. You may feel this is limited – and it is – but it will become a richer and more densely populated knowledge map after stage three. Start to build this up as a knowledge map by putting the question in the centre of the page and then divide the page into three horizontal zones to signify 'sky', 'ground' and 'underground'. Start adding in sources of knowledge as they come to mind and explain this to the others in the set who are acting as your resource.

3. Build on this map through discussion with others

Given that you do not know what you do not know, you need to involve others from your action learning set in order to enrich your knowledge map. This is where the action learning set plays a vital role. Some people find it useful to start drafting their knowledge map with their set and then build on it further in a knowledge mapping session with colleagues and specialists in their organisation.

At this stage, you are trying to create a richer map than your initial one, which will eventually inform your approach to searching and reviewing the bodies of knowledge of relevance to your challenge. Encourage the set or group members to put forward their ideas to support you. Good questions to tease out contributions here would be, for instance:

Ground:
Where is there organisational data of any relevance to this problem?
Who has strong views on this issue in our business?
Where in the business have similar problems been tackled before?

Sky:
What professional journals might be of relevance to explore?
What are the related academic disciplines, and within these what subjects (e.g. 'Psychology' – theories of 'motivation')?
Which other organisations are known to be leading edge in this regard?

Underground:
Who holds the real power in this situation? (leading to research about power and influence)
What are the underlying values and beliefs of key people? (leading to research about values and beliefs)
What are the cultural influences? (leading to research about culture).

4. Form a plan for your research

Having now created a knowledge map relating to your question you need to plan research in a focused and efficient way. Identify the questions you would like to explore through your research, which might be conducted as desk based, internet or face-to-face research. Such research takes place between action learning set meetings at which you should report back your analysis of the 'P' which should then inform further discussion and plans for action in order to tackle the 'Q'. TJ

You can see Richard Hale explaining knowledge mapping in a series of clips at www.youtube.com/rihale

Dr Richard Hale
is co-founder of Action Learning International (www.al-int.com) and professor in management development with the pro fessional body for action learning qualifications, International Manage ment Centres Association. He can be contacted at richard@al-int.com