Fundamentals of action learning

In the third of a series of four articles, **Dr Richard Hale** looks at mobilising action learning

In previous editions of *TJ*, I have described the constructs behind the model for action learning facilitation[1]. This month's contribution seeks to create a balanced perspective on the role of the facilitator, aligned with the original thinking of Reg Revans, suggesting that the specific skills of working as a learning set adviser are just as important as the 'modes' of being a mobiliser and a learning catalyst.

In the first part of this series, I suggested a useful framework is to consider the *focus* and *locus* of action learning as comprising three inter-related perspectives, these being the 'self' (the action learner), the action learning 'set' and the 'organisation'[2]. I would suggest the skills of being a mobiliser and learning catalyst are more rare than those of learning set advisers. There is also a risk that, by focusing so much on activities and discussion in the learning set, we neglect the importance of embedding action learning within organisations. One reason some action learning initiatives eventually falter is because of a failure to anchor action learning activity into organisational and strategic imperatives and systems. The other threat to well intentioned action learning initiatives is that those people who take on the role of facilitating action learning are unable to rise above the machinations of specific learning set activities to take an organisational level perspective. Action learning is primarily meant to help address organisational challenges not to enhance training programmes.

Key capabilities of the mobiliser

The mobiliser of action learning should be aware of, and conscious in, addressing four key issues:

- *Purpose* – being clear about the purpose of action learning and how it fits with the vision and strategy of the organisation where it is to be applied.
- *Scoping/framing* – persuading key sponsors and stakeholders of the benefits of taking an action learning based approach and identification of potential participant groups and delivery partners.
- *Sponsor relationships* – forming, building and maintaining effective relationships with key sponsors.
- *Governance* – establishing sustainable governance structures and process supported from the top.

Financial services sector case study

I was engaged by a major bank and financial services corporation to develop an action learning based programme to support development of leadership capability as the business faced considerable challenges in the shadows of the global financial crisis. The programme ran for around six years and was based on participants completing postgraduate Action Learning Questions resulting in the award of masters degrees in leadership. Many of the projects tackled led to significant measurable return on investment for the business as well as →

Key to the success of this programme was the way significant sponsors were mobilised and how the governance structure was established and maintained

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One reason some action learning initiatives eventually falter is because of a failure to anchor action learning activity into organisational and strategic imperatives and systems

References

1 R. Hale, "*Bright horizons for action learning*," *TJ*, July 2012, p25–28

2 R.Hale, "*Fundamentals of action learning*," *TJ*, August 2014, p30–36

supporting the development of specific leadership capabilities of the action learners. Key to the success of this programme was the way significant sponsors were mobilised and how the governance structure was established and maintained.

The head of leadership and development had been tasked with establishing a comprehensive suite of leadership programmes with associated accreditation. The drive for this came from executive level with support from the chief executive of the division. As a potential external adviser and provider I was invited by the head of leadership and development to explain to key internal stakeholders how the programme might be developed.

The head of leadership and development and I worked from the start as a team, supporting each other to mobilise the key sponsors at the same time as providing internal awareness regarding the values and principles of action learning. Rather than presenting to the senior executives a 'sales pitch', a session was facilitated where we role modelled action learning by explaining the distinction between puzzles and problems and inviting directors to put forward possible business challenges which might be tackled by action learning sets involving the high potential leaders in their talent group. Soon the audience were working as an action learning set themselves as they each shed a different light on the organisation's challenges from the perspective of their respective functions such as finance, customer service and business development. This process was repeated with several groups including those who would be at the level of line manager of participants. This was important as it was recognised that line mangers of participants could become 'break-it' people if they felt threatened by their own team members working on business problems outside of their own business area. Soon a list of organisational challenges was developed which could be presented to programme participants to help inform their choice and shaping of action learning projects.

As mobilisers, this process enabled us to identify the 'make it' and 'break it' people. For instance, there was an enlightened customer service director who immediately could see the benefits of the approach and who turned out to be an excellent sponsor of the programme. We also recognised there were a couple of influential senior team members who saw the approach as a threat to their existing empire or expertise. Rather than confront them, our approach was to embrace them and invite them to join the steering group which was being formed to govern the overall action learning based initiative. We were helped considerably by having overt support from the chief executive who agreed to chair the steering group from the start. Furthermore, he was to attend every quarterly steering group meeting and was actively engaged in discussion about the action learning projects being addressed.

The steering group was formalised as the key means of providing governance for leadership development comprising several senior executive members, the director of HR, the head of leadership and development and programme participant representatives elected by their peers. Structurally, this provided a clear line of sight in all directions between the chief executive and the participants. Note that the steering group was not chaired by the head of leadership and development or the HR director who were there to provide a valuable professional role in supporting a programme that was seen as business-driven. At the quarterly meetings, this group discussed issues such as:

- The relevance of the Action Learning Questions participants were proposing to address.
- The results and return on investment from these projects.
- How future projects could build on the work of previous Action Learning Questions.
- Participant perspectives.
- Specific difficulties participants were facing.
- Feedback from participants on their experience over the past three months.

Furthermore, the steering group enabled senior executives to feel they had a real say in enabling future leaders to develop. They would then volunteer to attend programme workshops, share their experience or speak on relevant business

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and challenges and mix informally with the participants. This served to break down many of the existing psychological barriers in what was a very hierarchical and silo-based culture.

Ultimately, the programme created a powerful internal research facility with members who were operational within the business addressing such questions as:

- How do we reduce bad debt?
- Should we maintain a branch network?
- How do we improve employee engagement?

How do you measure up as a mobiliser?

The 11 statements below are provided to enable you to review your own capability as a mobiliser of action learning.

Rate yourself against these statements. Where you rate yourself as weak or moderate in your ability, consider how you can develop your awareness or capability in these areas. TJ

Purpose		Weak	Moderate	Strong	Excellent
1	I am aware of strategic organisational challenges that could be addressed through action learning.				
2	I am aware of existing organisational projects or activities, which could be enhanced by action learning.				
Scoping/framing					
3	I am aware of different parts of the organisation, which could be brought together for mutual benefit in action learning.				
4	I know how to bring external organisations (e.g. suppliers, partners, customers) into collaborative action learning relationships.				
5	I have clear and compelling presentation materials and ability to position action learning as a preferred approach.				
Sponsor relationships					
6	I am clear who the most senior sponsors are for action learning in my organisation.				
7	I know who the 'make-it' people are who are likely to back an action learning approach.				
8	I know who the 'break-it' people are who might jeopardise an action learning approach.				
9	I have strategies for engaging the 'make it' and 'break it' people.				
Governance					
10	I am capable of forming a strategic group for governance of the action learning initiative.				
11	I can present a case for creating an ongoing governance framework for the action learning initiative over the intended timeframe of the action learning initiative.				

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