

# Fundamentals of action learning

In the final part of this series, **Richard Hale** explores the key steps in action learning questions

**I**n this final article, I take the perspective of the action learner who is working through the Action Learning Question (ALQ) process. The stages and associated steps are presented with trigger questions to help guide the action learner over a three- to four-month period as they create and then tackle their ALQ based around a business-related problem.

## ALQs

My own contribution to the theory and practice of action learning has developed through work with clients who have adopted and adapted the ALQ process. This has been reported on in *TJ* since its early development in the late 1990s and over the years, case examples have been published of how ALQs have been applied in many sectors ranging from financial services to construction and central government in order to support leadership and professional development<sup>1, 2, 3</sup>

The basis of the methodology is that 'wicked' or messy problems found in organisations, those that cannot be tackled by straightforward project management, may be reformulated as questions which are then addressed by action learners with the support of their learning set. ALQs provide a practical approach to organisational research which is conducted and informed by practitioners within the business.

By following the process of scoping the ALQ, it is possible for the action learning journey to be recognised at postgraduate level, leading to professional management and leadership qualifications. In this way, continuing professional development (CPD) is evidenced by individuals who have actually made an impact on the business.

## Example ALQ

Below is an example of an ALQ developed

by a client in the care profession where centre managers are typically recruited from professional patient-facing roles. The challenge is that local care centre managers are required to promote their services to the local community and to register fee paying service users. This is in a climate of increasing competition with other service providers starting up in certain regions of the country. The head office identified that the share of the market is being lost in these regions and client registrations are falling despite government statistics showing an increasing need for care services.

The question was formulated as: *'How can we enable our care centre managers to become more commercially minded?'*

The four stages of the ALQ process and some of the questions are shown below with some illustrative references to this ALQ. All of the stages shown here required discussion amongst action learning set members in order to enable the essential social dynamic of learning 'with and from others'.

## Scoping

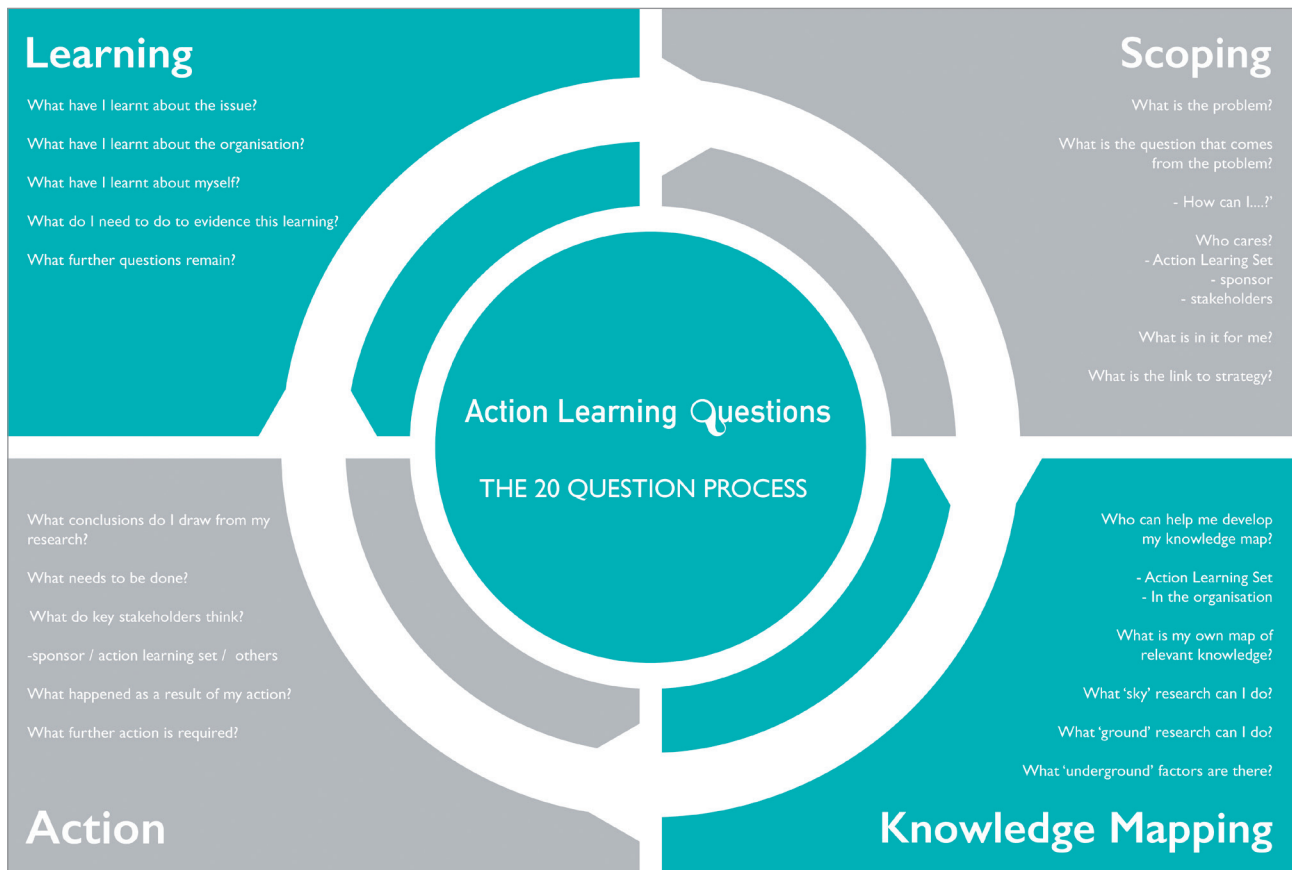
### SI – What is the problem?

Problems are issues that, if they are not tackled, are likely to lead to bigger problems in the future for the business. In the example above, the problem relates to the fact that some regional care centres are underperforming financially which fundamentally threatens the future of the business.

### S2 – What is the overall question that comes from the problem?

Initially the question in the above example was formulated as: *'How can we ensure care centre managers become better at sales?'* Consultation with stakeholders led to the realisation that this was a challenge that related not simply to the sales





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**References**

- 1 S. Caulkin, Reg Revans, Inspired management thinker of 'action learning'. *The Guardian*, 8th March, 2003
- 2 R. Hale, 'Adding Real Value with Work Based Learning Questions'. *Training Journal*, July, 2004

process but was about developing commercial awareness in a broader sense.

**S3 – Who cares?**

It is important to consult with stakeholders and clients who have an interest in the question and who will benefit from the action learner's work on it. In the care centre organisation, this meant consultation with centre managers, regional managers and commercial and marketing managers in head office.

**S4 – What is in it for me?**

You are more likely to be successful in tackling your ALQ if you can see there are potential personal benefits. Benefits could include personal or professional development or the acquisition of new skills.

**S5 – What is the link to strategy?**

The problem being addressed as an ALQ should relate to the organisational strategy.

**Knowledge mapping**

For more details on the knowledge mapping

process see the second article in this series in *TJ*, September 2014<sup>4</sup>

**K1 – Who can help me develop my knowledge map?**

A knowledge map is a collaboratively generated visual representation of areas of knowledge which are relevant for further research. This process can help broaden one's vision of relevant fields to investigate. Knowledge maps can be developed within an action learning set and with other colleagues.

**K2 – What is my own map of relevant knowledge?**

You do need to map out how you see the connections between different themes or areas of knowledge as a starting point. For instance, the action learner working on the example ALQ above saw this as relating to the theme of sales training and instinctively wanted to investigate what sort of sales training could be offered to care centre managers.

**K3 – What 'sky' research can I do?**

When you start sharing ideas in terms of relevant

sources of knowledge within a learning set this may lead to unexpected insights. Set members in drafting an enhanced version of the knowledge map for the ALQ above suggested it would be worth investigating the self-image that carers have relating to their professional roles and careers. This led to a realisation that delivering more sales training alone would not address the problem.

'Sky' research may include comparison with the practices of other organisations. In the case of the ALQ above, visits were arranged to different types of organisation in the care sector that were operating in a commercial context.

#### **K4 – What 'ground' research can I do?**

'Ground' research means looking for data within the organisation which might inform decisions and actions. In the case of the ALQ above this involved interviewing managers from different care centres nationally and exploring their views regarding the challenge. This revealed there was significant resistance from some managers who felt that sales was not their role and that their main purpose was delivering effective care to service users.

#### **K5 – What 'underground' factors are there?**

Research into the 'underground' forces showed that there were competing political views relating to the organisational purpose and these were polarised around the desire for sales and the need to provide effective and safe care for service users.

### **Action**

#### **A1 – What conclusions do I draw from my research?**

In the case of this ALQ, a key conclusion was that the strategy of offering training for managers in sales processes and skills was unlikely to lead to an improvement in the commercialism of the care centre managers.

#### **A2 – What needs to be done?**

Action is an essential requirement in action learning and in the case of this ALQ, a number of actions were proposed including sales training but also a review of recruitment, induction and professional development for care centre managers. It was also recognised that taking a commercial approach included, for example, improving the generation and use of management information.

#### **A3 – What do key stakeholders think?**

Key stakeholders interested in the ALQ should be consulted for input into the terms of reference

for the ALQ and provided with feedback informally and formally as the question is addressed and conclusions are derived from the research.

#### **A4 – What happened as a result of my action? & A5 – What further action is required?**

The action learner should report back to the learning set, possibly over several cycles of action learning, the outcomes of the actions taken. There are three key questions set members should ask each other:

- 'What have you done?'
- 'What will you do?'
- 'What have you learnt?'

### **Learning**

#### **L1 – What have I learnt about the issue?**

Learning about the 'issue' in the example above relates to the challenge of reconciling the business need to provide effective care with the need to operate commercially.

#### **L2 – What have I learnt about the organisation?**

Action learning is about addressing organisational challenges and action learners should consider what they have learnt about the organisation, for instance about the culture and the sources of power.

#### **L3 – What have I learnt about myself?**

Action learning provides an opportunity for personal reflection about oneself which often leads to powerful insights.

#### **L4 – What do I need to do to evidence this learning?**

If the ALQ is accredited at higher education level then evidence of learning is incorporated into a written paper and presentation to assessors.

#### **L5 – What further questions remain?**

Where ALQs are being applied across an organisation as a strategic tool to support innovation and change then the ALQ is likely to surface other questions that need to be addressed. In the example above, it was recognised that further ALQs should be tackled which had been spawned by the initial question. This included questions such as:

- 'How should we develop our approach to recruitment and selection of care centre managers?'
- 'How can we assess the ability of potential care centre managers in terms of commercial awareness?' **TJ**

3 R. Hale, 'Bright Horizons for Action Learning'. *Training Journal*, July 2012, p25-28

4 R. Hale, "Fundamentals of action learning", *TJ*, September 2014, p15-17

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