



The Exact Expertise to
Ignite and Sustain Performance™

LSA Global | White Paper



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Action Learning An Introduction

Action Learning is the heart of a strong Leadership Development Process, based on the idea that people learn best when they have to take real and important action rather than do an academic exercise.

Action Learning is a learning-by-doing leadership education concept that was first introduced in the United Kingdom by Reginald Revans in the 1950s. It has been used extensively in Europe, Asia, the Pacific Basin and South Africa by companies such as Volvo and Wartsila. Recently, companies in the United States have begun using variations of this approach; General Electric, for example, uses a project-based methodology in its leadership education.

Participants in an Action Learning program are often high potential individuals selected to prepare for leadership in the company. The Action Learning projects are long-term problems or opportunities selected because of their significance to the company's future and the leadership learning potential for the individual or small group taking responsibility for the project. The outcomes are a balance of: 1) direct action to solve a problem or take advantage of an opportunity, and 2) the personal and professional learning and development that results from taking on a project that is an appropriate "stretch" for each individual.

Participants work on their own and in small learning teams to achieve both action and learning results. The unique combination of live experience with the reflection required by the process allows participants to transfer their knowledge to other situations in which they are involved during and subsequent to the Action Learning process.

1. Project Identification

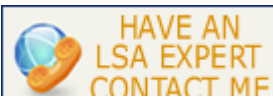
The projects are identified through meetings with executives who will be the project sponsors. They may be ones that have already been identified as task force projects or others that could best be done as learning projects for individuals or small groups. The suggested projects are analyzed by a committee to identify competencies which can best be grown or developed through each of them. Each participant, along with his or her supervisor and/or development advisor will choose a project that best suits the participant's specific developmental needs. These needs will have been identified through the feedback process.

2. Criteria for Project Selection

Each team of participant, supervisor and DA will need to select a project that emphasizes the use of competencies that the participant wishes and needs to develop. Not all projects that an organization needs to work on will be appropriate to the Action Learning process. Projects suited to Action Learning should be

- Important to the future of the company
- Related to/require use of important management or leadership competencies
- Not currently being worked on in the organization or very early in the process of being worked on
- At least 4-5 months in duration
- Equally focused on learning and action results
- Selected and sponsored by top management

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Each project should be based on a problem that is “owned” by a sponsor in top management. The sponsor believes that it is important for the project to be done and is willing to have it worked on as a developmental project rather than by an “expert.” He or she agrees to act as “consultant, collaborator, educator and catalyst.”

Most of the problems that have been chosen fit the following specific criteria:

- There is no current solution
- A complex situation needs to be dealt with
- A situation “falls between the cracks;” i.e., it is important to deal with, but nobody currently “owns” it
- Several different leadership competencies will be required
- The problem is strategic in nature and crosses departments or business units

3. Examples of Projects

Following are examples of problems that have been used as Action Learning projects:

- Evaluate the business strategy of a segment of the company which is losing money. Determine where the current strategy is viable and where it is not; recommend new directions.
- Articulate and detail the product development process across the corporation, make recommendations for process improvements and alignment/coordination across different business units.
- Learn how to recover overpaid duty on an imported part; develop an inventory control and duty recovery process.
- Redesign a functional organization around core processes.
- Develop an approach for maintaining employee morale and reducing turnover in a business unit.

Participants in Action Learning must research, diagnose and offer a solution to the problem as well as taking action to implement the solution they have proposed. They need to influence others to give them information and resources and to accept their recommendations. They work closely with the other members of their learning team, (who may each be working on a different project) coaching and collaborating with one another across department and division lines.

4. The Role of the Sponsor

The sponsor’s role (consultant, collaborator, educator, catalyst) is ongoing and evolving throughout the life of the project. He or she will consult regularly with the participant or participants who have selected that project to work with, providing all relevant information including boundaries or limitations and success criteria. He or she will also provide needed resources, within reason, to work on the project. Since it is a developmental project, the sponsor will look for the right opportunities to turn participants’ questions and requests back to them as challenges to take leadership and initiative; for example, to negotiate for information and resources with others in the organization. The sponsor will act as a “sounding board” for the participant’s ideas about the project, but will also exercise his or her “client’s rights” for information about progress.

At the conclusion of the project, the sponsor will respond to the recommendations of the individual or team working on his or her project. (Acceptance or rejection should not come as a surprise to the participant if she or he has been working closely with the sponsor all along). If they are rejected, the sponsor will work with the participant to be sure that he or she understands why the recommendations were rejected and learns as much as possible. If they are accepted, the sponsor will support the participant in taking the actions required to implement those recommendations.

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5. Project Teams/Learning Teams

Many projects will be done as part of an existing or new project team or task force. These teams may or may not have a specific learning focus. Alternatively, the projects may be carried out by individual participants who join with others in a learning team.

Thus, learning teams may be organized in at least two different ways:

Combined Approach

The task team and the learning team are the same. All members of the team are involved in the same project. Team meetings have a specific time devoted to learning as well as a continuing awareness of the learning process while the task is the focus of the team's work. The advantage of this approach is the efficiency of the use of members' time and the practice of combining action and learning in a realistic work setting. The disadvantage is that learning often can take second place to action, especially under pressure to complete the task. In addition, the feedback to individuals and learning challenges offered may not be as objective where everyone has a vested interest in the outcome of the project. This approach works best when there is a facilitator who meets with the team on a continuing basis to keep the learning focus on track; thus it requires more resources.

Specialized Approach

The learning team is separate, consisting of several individuals, each of whom is working on a different project either as an individual or as part of a task team. Team meetings consist of a review of members' projects and a focus on their individual learning and learning needs. The advantages of this approach are that members can help one another learn from a more objective perspective, the learning may be richer because of the variety of projects; they are getting an experience more analogous to an executive team with everyone responsible for a different area yet with overarching common goals. The teams can be self-managed most of the time; since they are not likely to be drawn back to a shared task, a facilitator is less necessary. The main disadvantages are that it may require more time and that it may not transfer as well to team learning, although the individual learning will probably be stronger.

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