Action learning — getting project teams to work

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Abstract

Do you have an important project that needs to be done well, and you don't have much time to work on it? Perhaps you could set up a project team to help you with it. You could use a form of action learning.

Would you like your managers to help each other more, and to learn from one another? You could use another (similar) form of action learning for that.

In both instances the people involved will also improve their skills at solving problems, managing projects, facilitating groups and building relationships. These are skills increasingly relevant for leaders at all levels of an organisation. Would that be an advantage?

Do you and your people spend much time in meetings? If your meetings could be more effective and more enjoyable, would that be beneficial? Action learning team members learn to facilitate better meetings.

If the project work has to be done anyway, the costs of action learning can be low relative to the benefits. Because the learning is work-relevant it is more likely to be used in practice.

Action learning, used with some forethought, can be a very effective way of developing leadership and problem-solving skills amongst your managers and others. For organisations trying to move from a "command and control" style to something more involving this can be valuable. It can help to build a high performance culture.

Perhaps you're wondering if action learning would be useful in your organisation. If so, this document may help you decide. It describes action learning, and how it can be used for maximum benefit.

Contents

What is action learning?

Broadly speaking there are two forms of action learning. In one, a number of people (usually but not necessarily from different organisations) bring individual issues to the action learning group — "learning set", as it is often called in the literature.

At each meeting, one member of the team describes a problem or issue that is important and difficult. The other team members, through supportive inquiry, help their colleague to develop a deeper understanding of the issue. This is the traditional form developed by Reg Revans, [1] the originator of action learning. The teams are often expected to become self-facilitated after a few meetings. This form of aciton learning is more common in Britain, though there are Australian examples.

In the other form of action learning the learning set takes the form of a project team. People, usually from a single organisation, are assembled to work on a joint project of value to the organisation. This second form is more common in the United States. It also tends to be more vigorously facilitated (by a "set advisor") than the British variety. The facilitator attends all meetings and plays a prominent role.

Both forms are used almost exclusively by organisations. There is no good reason, though, why you couldn't use them to good effect in community settings. There are also hybrid forms, one of which I describe here. It's the form I mostly use in my own action learning work.

Most of the action learning I facilitate is in-house and project based. To strengthen the leadership and facilitation experience of the learning set members I minimise my own facilitation. My goal is to transfer the responsibility for facilitation to the learning set as soon as I can. This helps them to enhance the leadership skills that are most relevant in modern organisations and changing times. My intention is to increase the transfer of skills from the learning team to the day to day operation of the organisation.

A typical action learning set is depicted graphically in Figure 1 — not all of these components are obligatory.

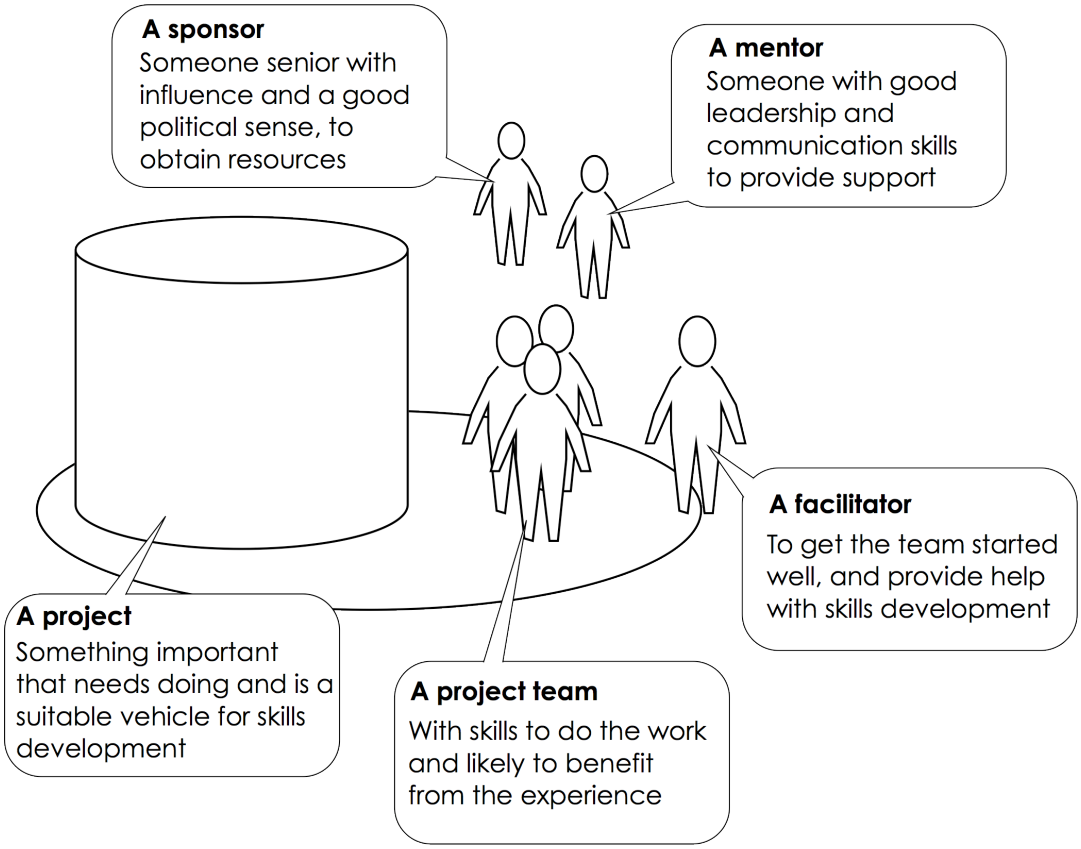

Figure 1. Elements of a typical project team

It isn't hard to increase the impact of action learning on the organisations culture and leadership style. To do this you embed a single project such as this in a larger program consisting of several action research sets and projects — more on this later. The multiple learning teams can collectively function as a community of practice, strengthening cross-functional links in the organisation.

Let's work our way through some of the issues you might take into account when you set up an action learning program or project.

When would you choose action learning?

In much conventional training it can happen that the skills learned in the workshop remain in the workshop. Transfer of skills to the job is difficult, as Holton and Baldwin [2] report. Action learning increases transfer because the skills are learned in a situation directly relevant to work.

The project-based form of action learning offers an organisation some additional advantages. The learning takes place in the workplace. Learning transfer is therefore even less difficult. Through sharing facilitation of the learning set, people learn facilitation skills. These are increasingly the skills that managers require in a fast changing world. This form of action learning can be an effective (and cost-effective) form of leadership development. In fact, most of the action learning programs I've helped to initiate were provided as leadership training. The leadership outcomes were intended as primary; the successful projects were a welcome bonus.

The project typically chosen is one that has high value to the organisation. It is complex enough to provide sufficient challenge and opportunities to learn. Because the learning set members are more reflective and analytical about the project it tends to be better done. In addition, if the project is something that must be done, the extra costs of action learning can be quite low.

In unpublished evaluations of action learning in Australia participants have reported high levels of personally relevant learning. There are also several published studies [3] that report positive outcomes or strongly positive returns on investment (ROI) from action learning.

If your situation meets most of the following conditions then either form of action learning may be a suitable choice:

- you'd like your leaders to show more leadership, in ways which build morale and cohesion
- you're keen for your leaders and managers to do more facilitation and less "command and control", and you'd like them to have the skills to do this
- you'd like your people to conduct meetings, especially for problem solving and decision making, that are more effective and enjoyable and less time consuming
- you'd like leadership to be displayed at *all* levels of the organisation, not just by people with managerial positions
- you want the learning to be relevant for both the organisation and the participants.

If in addition the following conditions apply, the project-based form of action learning is more appropriate.

- there is an important project which needs to be done (or at least is highly desirable), or several of them
- the project or projects are complex enough that they will be difficult to do well without some thought and analysis, and preferably achievable within a three to six month timeframe
- the project or projects are suitable vehicles for people to learn communication, problem-solving, decision-making and other related skills.

In organisations where workloads are high, an early project team may examine ways of creating time for action learning meetings. Improving other meeting procedures is often a valuable way of doing this — in most organisations, meeting procedures can be substantially improved.

If you decide to proceed, there are some important preliminaries that require attention. You might begin by deciding tentatively on the overall shape of the program.

Setting up a project-based action learning team

In my own approach to project based action learning I prefer to follow the process summarised in Box 1 below.

Box 1: setting up a project team

If there are multiple teams, set up a working party to oversee the action learning program

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Initially: choose the first project, participants, sponsor(s) and mentor(s)

↓

First meeting: address relationships, purpose, process and stakeholders

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Second meeting: a team member facilitates the project work, with coaching from the facilitator

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Third meeting: the project work continues, with the facilitator present

↓

Further meetings as required, with the team managing its own process until completion

↓

Final meeting: project learning is identified and skill transfer to the workplace (and to later projects, if any) is planned

↓

Team disbands

I now describe these elements in more detail.

Before the first meeting

If there are to be multiple project teams I also like to work with a small working party from within the organisation. The working party helps to oversee the project work. It also operates as an action learning team.

The use of such a working party offers several benefits.

- It reduces the dependence of the organisation on me or other consultants — the working party can later set up other action learning programs or teams.
- Because working party members are from the organisation they help to ensure that the skills and projects are relevant to the organisation and politically

suitable. (External consultants can come to grief because they don't understand the local politics and culture and don't have adequate contacts.)

- Working party members can also learn or enhance their mentoring and coaching skills, in addition to the usual learning from action research.

I may help the organisation to choose suitable projects. The best projects are

- important
- necessary or at least highly desirable
- complex enough to be a good vehicle for learning
- and preferably able to be completed within three to six months.

I also provide guidance on choice of action learning team members, consisting of people who:

- are enthusiastic volunteers
- are, or will be, in leadership or management positions; or have opportunities to offer leadership in their current or near future roles; or are in an organisation that wishes to devolve leadership to all levels of the organisation [5]
- are being helped to acquire more facilitative skills, for example because the organisation is trying to be more flexible and resilient
- between them have skills and/or knowledge relevant for the project
- each bring different skills and experience to the project, and preferably also
- less importantly, don't know each other very well — it is then easier for them to try out new behaviours, and the informal organisational networks are enhanced.

As far as possible I encourage the use of small rather than large teams. I prefer to use the smallest team that is able to complete the project successfully. A small team can access wider skills and knowledge by co-opting others from time to time as required. Large teams are more difficult to facilitate and less efficient. As well, scheduling meetings for larger groups can be a nightmare.

Most of the literature recommends teams of from five to eight people. My own experience is that teams of three work very well. In such small teams the attendance tends to be more regular. In addition, the facilitation is less demanding on the team members and they become self-sufficient more quickly. Also, it may be more

evident to a small team that they are unlikely to be able to represent all stakeholders. They may then be more likely to be careful to identify and consult the absent stakeholders. In addition a team can co-opt other people onto the team briefly when specific expertise is needed.

If sponsor and mentor haven't already been chosen they can also be chosen now. Their roles can be negotiated with them, as follows.

- The **sponsor** is a senior manager who is respected and influential in the organisation. (S)he is preferably someone with political skills for whom the project is important, and is willing to intervene to support it. The sponsor's role is to ensure that the team has sufficient resources to complete the project.
- The **mentor** is also a manager, often senior — though that is less important than it is for a sponsor. The mentor is someone approachable, with good interpersonal skills and political nous. This is a person who can offer guidance to the team about teamwork and relationships and organisational politics. Ideally the mentor is someone who will guide people by asking questions rather than through giving lectures. As I mention below, in ongoing action learning projects the graduates from earlier teams can often mentor later teams.

In action learning programs I've been involved in, the team members are not the only people who learn valuable skills and practices. Mentors and sponsors have also found their involvement with the program a useful learning experience. This has also been a common comment from mentors and sponsors when I've evaluated action learning programs for other facilitators.

Before the project work begins I like to have a conversation with each team member and her or his immediate manager or supervisor. I prefer team member and manager to have realistic expectations about the time required for the project. If sponsor and mentor are also involved, their roles can be negotiated with the team at the same time.

If feasible, the meeting can also involve the organisation's CEO or her nominee. This helps to signal that there is support from the top. It also increases the likelihood that the team project fits in with the CEO's plans for the organisation. If the program is intended to contribute to a cultural change in the organisation, it is very beneficial for it to fit well with the CEO's longer-term vision. Visible support from the CEO can do much to improve the willingness of people to be involved in the program.

The first meeting

At the first meeting of a project team, I facilitate. If there is a separate working party overseeing the action learning program, it is of benefit to have one of its members present as a co-facilitator. She will learn how to start up an action learning project. Her support may assist my acceptance by the team.

The first meeting is important. It sets the scene for later meetings. It develops a constructive approach while undermining some of the less constructive habits that bedevil most organisations.

I like to have at least two and a half hours for this meeting, and preferably three hours. In the available time the meeting works through as many as possible of the activities summarised in Box 2 below.

Box 2: Agenda for the first meeting

Negotiate my role
↓
Build relationships and sense of community
↓
Further define project outcomes and purpose
↓
Agree the process to be used by the team
↓
Identify absent stakeholders
↓
Review and critique the session
↓
Agree time, facilitator and agenda for next meeting

Much of the first meeting is taken up with building relationships and a sense of community within the project team. The purpose is for the team members to experience each other as real people, not just as organisational roles or clusters of professional or other skills. I give this more attention below.

If there are multiple teams I prefer to stagger their starts. This spreads out the workload for me and for the co-facilitator from the working party. It also allows

later teams to learn from the experience of the early teams. For instance suitable members of early teams may act as mentors or co-facilitators of later teams. This helps to share the responsibility for learning; and it adds to the organisation's informal networks.

Here are the steps of the first meeting in more detail ...

After negotiating my role (if this has not already been done) I guide the team through four activities:

1 As mentioned, the key activity consists of some intense **relationship** building.

It might be done, for example, by inviting each of them to talk about skills and qualities in addition to their usual work skills and that they bring to the project.

Two examples of processes for building relationships are described in Box 3 and Box 4.

Box 3 An activity for relationship building

The most effective activity I know for relationship building is this one. [6] (For some groups it may not be "tasky" enough. For such groups a description of an alternative follows below.)

Allow about four minutes per story, and seven or eight minutes for preparation.

Individually —

- Think back over your life so far. Identify six *turning points*: events or people (or both) who made a difference to who you are and what you do
- From those six turning points choose three that you are willing to talk about
- For each, prepare: a brief description; a sentence or two on why it was a turning point; several sentences on what it says about you, now

In small groups —

- Each person relates one of her turning points to her colleagues, looking at them as she does so; the others give her 100 per cent of their attention
- When each person has told her first story, each now relates her second story, as before; and then (after everyone has told the second story) she relates her third.

Box 4 An alternative activity for relationship building

In my experience this activity isn't as effective as the one above in Box 3. However, for some groups it may be more acceptable.

Individually —

- Identify some skill or talent you have that is likely to be useful to the project group, and that other members of the project group don't know about
- Think of an occasion when your use of that skill was valuable.

In the group —

- Each person in turn describes the skill, and the situation when her use of the skill was valuable.

2 Clarifying the nature of the project and the **purpose** of the action learning.

Some of this will probably have been done in an earlier interview. Here we anticipate what the results of a successful project will be, both for the organisation and for the participants as individuals and as a team.

This may be done by inviting the group to answer two questions:

– When you complete the project successfully, how will you be able to tell?

  To this you can add an element of visioning. You encourage the team to look beyond the project itself to the wider and longer-term effects of project success. Visioning has the added advantage that it, too, tends to enhance relationships.

– If the project has been a good vehicle for your learning, what will be the learning outcomes for you, individually and collectively? What will you be able to do more effectively in the future?

3 Agreeing on the **process** to be used to facilitate project team meetings. The purpose is to draw attention to process, and to improve it from meeting to meeting.

We typically do this by agreeing on a very small number of process guidelines that we think will improve the way we work together. In the past I used to use five or six guidelines. Now I think it works better to have only two (or at most

three) at a time. Six is too many to keep in mind; or if people do so, they take up so much attention that energy is distracted from the project.

A possible activity for identifying guidelines is briefly described in Box 5.

Box 5 Identifying process guidelines

- Working individually, each person thinks of two groups she has experienced which worked well, but which in other respects were different
- Working individually, each person thinks of two groups which worked badly, and which in other respects were different
- She then devises a guideline that, if the poor groups adopted it, it would have helped improve their performance in the direction of that of the good groups
- The guidelines are collected in the whole group, which then agrees on the two guidelines which they believe will be most useful for them.

The guidelines are captured on butcher paper or flip chart. They are posted where group members can see them whenever the group is working on the project.

An example of the sort of process guidelines that result is shown in Figure 2.

Process guidelines

- we will give each other honest and supportive feedback
- we will strive to make constructive use of every member's contributions

Figure 2 An example of process guidelines

4 Identifying other people who have an interest in the project — the "**stakeholders**".

When planning is done, it is usually desirable to consult with, or involve, many other people within (and perhaps beyond) the organisation.

I suggest that the list of stakeholders is kept visible during each meeting of the project team. Each time a decision is about to be made the team can check that the legitimate needs of all stakeholders have been taken into account.

As with the guidelines, the list of stakeholders is captured on butcher paper or flip chart. The list is brought to each meeting and posted visibly whenever the group is working on the project.

At the end of the first meeting I set aside at least 10 minutes to review how we have worked together. Usually we do this by revisiting the two (or three) process guidelines we developed earlier. We discuss how effectively we observed them, individually and collectively.

As we become proficient at observing one guideline we can omit it and add another. In this way the team slowly becomes familiar with more aspects of effective teamwork and more effective at managing its own process well.

Finally I also ask one or more of the project team members to volunteer to facilitate the second meeting. I offer to provide supportive coaching during the second meeting so that the meeting will be enjoyable and effective.

The second meeting

The second meeting (and all or most subsequent meetings) can be briefer: one hour is often sufficient. It seems to be more effective for a project team to meet for an hour each week than (say) two hours fortnightly or half a day a month. It is usually also easier to arrange brief meetings than longer meetings. It's a useful discipline for the facilitator to work to timeframes which are a little tight.

If necessary the second meeting completes any preliminary tasks (relationship building, purposes, processes and stakeholders) not finished in the first meeting. It then begins to address the project. Useful early events include

- planning how to involve the stakeholders previously identified
- breaking down the project into subtasks
- negotiating roles
- addressing how to make effective use of the sponsor and mentor, and
- deciding how individual learning goals will be supported.

Habits developed during this early project work are likely to be maintained in further meetings. It is therefore important to develop good habits early. I've found two habits, in particular, improve project work substantially:

- **Visible information**. We work to a whiteboard (preferably electronic) or a flip chart; in this way we maintain a public record of our work as we proceed.

  If flip charts are used I prefer to have two. One provides temporary work space. On the other, any decisions and action plans are captured.
- **Information before decisions**. Before we begin any problem solving or decision making we check that we've collected and understood enough relevant information.

In addition I encourage team members to work collaborative, not competitively. At the same time I urge them to be honest and (if necessary) supportively confronting with one another.

These practices are not only useful in project meetings. They can also improve meetings of most types. Managers usually spend a lot of their time in meetings. If they do, the improvements in meeting procedures alone can be a valuable additional outcome from an action learning program.

The team member facilitating can decide whether to be the "scribe" who records results or may ask another member to do so. There are often advantages in splitting roles like this. It makes it easier for the team member who is facilitating. It can increase involvement and interest in the way the team operates.

During this meeting and any subsequent meetings, the facilitator or anyone else (including me, if I am present) may call "time out" at any time. This may be called by the facilitator to help her to decide what to do next. The time out may be to draw attention to something that isn't working. It may be to analyse and if necessary remedy the process. It may be to draw attention to something particularly effective, so that the otherwise-tacit learning is made visible.

Near the end of the second meeting we:

- review any decisions made
- check that we understand who has agreed to do what, by when
- set a time and purpose for the next meeting

- ask for a volunteer (or two) to facilitate the next meeting
- devote at least 10 minutes to a review of our process, amending our guidelines if that seems useful.

I recommend that the facilitator for the second meeting helps the facilitator(s) for the third meeting to plan how to further increase the effectiveness of the third meeting. I suggest that the facilitator for the second meeting does this mainly through asking questions, not by offering suggestions. I strongly recommend that this practice is continued into the future. These meetings are also valuable as a time for the previous facilitator to reflect on what she did, and what she learned. Tacit learning is often made more explicit.

Almost everything I do is negotiable. However, I insist that in this and all other meetings there **is** a final process review. At least 10 minutes is devoted to this. It is done as for the first meeting, as described earlier.

Third and subsequent meetings

At the third meeting I'm present, but intervene only when necessary. If I do intervene, it is most likely by drawing the attention of the team to the present process. I encourage them to pay attention to what is happening, and to decide what they are going to do about it. My goal is for the team to demonstrate to themselves that they are capable of managing their own process effectively and enjoyably.

When the team has shown an ability to manage its own process I attend other meetings only sparingly or when specifically invited for some purpose — for example to help group members acquire some skill they have decided would be valuable for them.

Final meeting

When the project is completed the project team disbands. Before they do, at a final meeting they recall the sequence of events they have been involved in. They identify what they learned, individually and as a team, from their involvement. Importantly, they also identify the uses they will make of their learning in other project teams and elsewhere. This improves the transfer of learning from the project work to elsewhere and increases the benefit of the action learning.

Sometimes, as mentioned earlier, there are multiple learning teams. If so, they may be invited to exchange information between teams on what they have learned.

Setting up a British style action learning team

In the British style of action learning team it's usual for each team member to work on a different issue or project. At each meeting one of the group contributes an issue and asks for help with it. Other members then assist through supportive enquiry.

A group of five or six people is suitable, or even a few more. Otherwise I set up such groups in much the same way as I've described above. We do relationship building, and define the purpose and process of the team. There is often less need to define stakeholders, which is often better done separately for each issue.

When the group moves beyond the preparatory activities described, one of the group volunteers an issue. Suitable issues are those about which the person offering them feels blocked, ignorant or confused.

The intention is that the person's understanding is then deepened by the process that follows. This is done through questioning inquiry. In a well known summary of his approach Revans says that learning consists of programmed knowledge and questioning insight: in summary, **L** = **P** + **Q**. Revans argued that much conventional teaching and training consisted of too much **P** and not enough **Q**.

At this point there is a danger to be avoided — group members will often immediately shower suggestions on the person contributing the problem. They will often do so even before they understand the issue adequately. The person presenting the issue is overwhelmed by suggestions, many of which don't fit well. Further, this does little to deepen understanding.

My approach is to forbid offering suggestions for at least the first couple of issues and to encourage only sparing use later. I insist that only curiosity-motived questions are asked. If team members' curiosity about the issue can be aroused, the learning is greater for all of them. I monitor this closely — the practice of offering suggestions is so ingrained that otherwise team members still do so. They find ways to disguise their suggestions as questions unless challenged whenever they do so.

Usually group members learn after a meeting or two that their task is not to provide answers. It is to help to deepen their colleague's understanding. When this is achieved I can then relax the constraints and allow occasional and tentative suggestions provided the issue by then is well understood.

Other action learning issues

Individual issues in a project based team

Within a project-based action learning team it is often relevant for part of some meetings to be run in the same style as the British form of action learning. It's not unusual for each person to have some individual responsibilities within the team. Any team member can bring difficult issues to the group for help.

Negotiating resources and (especially) time

I've found that it is often necessary to negotiate for the action learning team to have enough time to meet. In two action learning projects that I evaluated, participants felt exploited because they were expected to find the time for meetings on top of their usual job. Most project teams willingly do more than they are asked to do. It is unnecessary (and in my view unethical) to exploit them deliberately.

This issue can be addressed during early negotiations with the team's sponsor and the team members' immediate superior. It also remains the responsibility of the sponsor to assist with this when it is needed. Without special attention, however, it can be overlooked.

Additional skills

In both styles of action learning group, I've learned not to provide much skills development before the groups begin. Instead, I now prefer to provide skills development when the team members request it because they have realised the need. They are then more likely to make use of the skills.

When there are multiple teams it may be more convenient to run separate workshops rather than take up project team meetings. Team members then volunteer to attend if the skills covered are sufficiently relevant for them.

Notes

[1] Revans, Reg W. (1998) *The ABC of action learning: empowering managers to act and to learn from action*, third edition. London: Lemos & Crane.

[2] Holton, Elwood F., III, and Baldwin, Timothy T., eds. (2003) *Improving learning transfer in organizations*. San Francisco, Ca.: Jossey-Bass.

[3] Cunningham, Ian (1991). Action learning for chief executives. In Pedler. M., ed., *Action learning in practice*. Aldershot. UK: Gower. Raudenbush, Linda, and Marquardt, Michael J. (2008). Growing leaders at the U.S. Department of Agriculture: a case study of leadership development using action learning. Public Administration Quarterly, 32(2), 147-173. Reeves, Tom (1997). Rogue learning on the company reservation. In A. Mumford, ed., *Action learning at work*. Aldershot, UK: Gower, 386-408. Teare, Richard, and Prestoungrange, Gordon (2004). *Accrediting managers at work in the 21st Century*. Prestoungrange University Press. Wills, Gordon, and Oliver, Carol (1996). Measuring the ROI from management action learning. *Management Development Review*, 9(1), 17-21.

[4] Raelin, Joseph A. (2003) *Creating leaderful organizations: how to bring out leadership in everyone*. San Francisco, Ca.: Berrett-Koehler.

[5] Tim Dalmau and I have described the first of these activities and some variations elsewhere, under the title "Personal history trip": Dick, Bob, and Dalmau, Tim (2000) *To tame a unicorn ...: recipes for cultural intervention*. Chapel Hill: Interchange.

Further reading

Inayatullah, Sohail (2002) Questioning the future: futures studies, action learning and organizational transformation. Taiwan: Tamkang University.

§ Marquardt, Michael J. (2004) *Optimizing the power of action learning: solving problems and building leaders in real time*. Palo Alto, Ca.: Davies-Black.

McGill, Ian, and Brockbank, Anne (2004) *The action learning handbook: powerful techniques for education, training and professional development*. London: RoutledgeFalmer.

§ O'Neil, Judy, & Marsick, Victoria (2007). *Understanding action learning: theory into practice*. New York: Amacom.

§ Raelin, Joseph A. (2003) *Creating leaderful organizations: how to bring out leadership in everyone*. San Francisco, Ca.: Berrett-Koehler.

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Weinstein, Krystyna (1999) *Action learning: a practical guide for managers*, second edition. London: Gower.

§ Those marked "§" are recommended as a starting point (Revans for the British approach, Marquardt or Raelin for the US approach, O'Neil and Marsick for both).