DEVELOPING LEADERS VIA ACTION LEARNING

A Primer for I/O Psychologists

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Action Learning
Definition, History, and Process
Cori Hill

Illustrating the Unique Role of the Action Learning Coach
Michael J. Marquardt

Integrating Action Learning into Larger Leadership Development Initiatives
H. Skipton Leonard

Constellation Power Generation Action Learning Process
Wayne L. Whitaker

Download slides at: www.sbcraig.com
click "downloads", select "SIOP2005"
Action Learning Defined

“Action Learning is an approach to working with and developing people that uses work on an actual project or problem as the way to learn. Participants work in small groups to take action to solve their problem and learn how to learn from action. Often a learning coach works with the group in order to help the members learn how to balance their work with the learning from their work.”

Yorks, O’Neil, & Marsick
Why Action Learning?

These are some of the reasons our clients choose it

- Build participants’ ability to work collaboratively across boundaries with a team of colleagues
- Develop leadership and team skills
- Expand participants’ capacity to learn and to provide real time, effective peer feedback.
- Discover new ways of working.
- Broaden knowledge of other functions, businesses and external environment.
- Improve capacity to learn while addressing a real business issue
- Deliver an added-value outcome to the organization by having a team work on engaging business issues not currently being worked on.

Benchmark Studies Point to Action Learning

World class leadership development initiatives do more than build new skills. They are designed to:

1) Act as an inspirational "rite of passage."
2) Generate horizontal networks of peers.
3) Engage executives in dialogue on the strategy, current and future business challenges.
4) Create access to internal and external leading thinkers and innovations.
5) Foster personal development through reflection and feedback.

Source: American Society for Training and Development, 2003
Theoretical Roots of Action Learning

Citation: Michael J. Marquardt
Action Learning in Action

“Action” Technologies

Action Research
This represented a real break with positivistic research for the
social sciences and grew out of the efforts to increase
knowledge about social systems while changing them. This new
form involved the researcher intimately and became a
predominate method for conducting systematic inquiry into group
phenomena.

Kurt Lewin (1946) the Father of Action Research

Reg Revans (1945)
The Father of Action Learning

Action Learning is....
An approach to the everyday work
of an individual, team, or
organization that results in both
performance and learning.
A process that involves a small
group working - with a coach or set
advisor - on real problems, taking
action while doing so.

Reflection on Practice......

Behavior Change

Articulation of reasoning,
beliefs, models

Action Science is....
An intervention approach which
also can be aimed at individual,
team, or organizational levels
that helps learners increase their
effectiveness in social situations
through an increased awareness
of the assumptions behind their
actions and interactions.

“Knowledge is to be produced
in the service of action.” Lewin

Citation's - adapted from:
-Marsick, Gephart, Huber
-Timothy Pych
-Joseph A. Raelin
## Differences Between Action Learning and a Task Force or Seminar

### Action Learning
- Designed to develop leaders while addressing critical business issues.
- Composed of a variety of people, not necessarily with specific expertise in that area.
- Questioning, reflection and learning is a key part of the process.
- Every member is a leader. AL involves a team of leaders.
- Tend to generate more creative solutions.
- May or may not be responsible for the implementation phase.
- Outcome: Business issue addressed and learning occurs.

### Task Force / Team
- Action Learning Has Multiple Purposes
- In a task force learning at team and individual level is incidental and not consistently or publicly known.
- Priority of Reflection vs. Task Focus
- Challenging Assumptions
- Multiple Accountabilities

### Instructional Seminar
- Action Learning Not Scripted
- AL promotes all-way communication
- Content driven by members’ needs in AL and organization needs in seminar.
- End Point Unknown

### Action Learning Process

<table>
<thead>
<tr>
<th>Preparation</th>
<th>Identify an Issue and Sponsor</th>
<th>Select Action Learning Team</th>
<th>Provide Orientation for Action Learning Teams</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Exploration of the issue. Initial ideas, questions, and hypothesis</td>
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<tr>
<td></td>
<td>Dialogue about what we did, what we learned.</td>
<td>Develop shared meaning and identify what needs to be further explored.</td>
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<tr>
<td>Completion</td>
<td>Reflection</td>
<td>Present Recommendations</td>
<td></td>
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<tr>
<td>Follow up</td>
<td>More AL</td>
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</tbody>
</table>

**The Coaches Role:**
- Understand group process.
- Observe and evaluate behavior.
- Create a feedback rich environment.
- Remain mindful of development.
Case Example:
Global Technology Organization

- Conducted yearly from Sept – February.
- Aimed at high potential “manager of manager” population. **66 participants. 16 teams. 8 action learning coaches.**
- Participants attended a plenary session in September, formed a team, created feedback contracts, identified an initial issue, and began the search for an organizational sponsor.
- Participants met on average, 2-3 times per month in the months following – many times without their coach or sponsor. Marked difficulties because of time zone/geographical distances.
- Marked drop-off in participation during 2nd & 3rd months. Increased efforts were seen as the deadline for presentations approached.
- Presentations to executive sponsors in February of this year.
- Follow up planned to measure results and learning.

Results

1. **What was the most important lesson you learned by participating on the action learning team?**
   - Much better understanding of the complete value of our portfolio.
   - “It is about priority – not about time.”
   - Practice collaboration essentials and authentic conversations
   - Working in global environment with different cultures and points of view.

2. **How will you use what you learned from your action learning experience to help you in the future?**
   - Continually challenge my organization to think broader in solving customer problems
   - Peer to peer feedback – will use in my next staff meeting.
   - How to leverage different perspectives

Final Thoughts….

How AL Fails
- Leadership is not committed to Action
- Action Learning as an event
- Risks and mistakes are not tolerated
- There is inconsistent, part-time participation

How AL Succeeds
- Leadership supports Action Learning as a way of working.
- Leaders role model Action Learning
- The environment is one of trust
- The intervention engages peoples’ motivation
- The organization and intervention support authentic behavior

Live your life as if you had no tomorrows.
Learn from your life as if you were going to live forever.

Mahatma Gandhi
Unique Role and Skills of the Action Learning Coach

Michael J. Marquardt
George Washington University
SIOP Conference
April 15, 2005

Components of an Action Learning Program

- Project, challenge, task, or problem
- Group of 4-8 people with diverse perspectives
- Reflective questioning and listening
- Developing Strategies and taking action
- Commitment to learning
- Action Learning coach
Two Ground Rules/Guidelines in Action Learning

1. Statements only in response to questions; anyone can ask questions
2. Action learning coach has authority to intervene whenever he/she identifies learning opportunities

6. Action Learning Coach

- May be group member or “external” partner
- Ensure sufficient time for capturing learnings
- Help members to reflect on interactions and implications of actions to be taken
- Assure norms and processes are followed
- Create an atmosphere of learning and reflective inquiry
Power and Restrictions on the Role of Action Learning Coach

- Has the power to intervene whenever he/she sees an opportunity for learning
- Combined with the ground rule of “statements only in response to questions” immediately and consistently transforms the culture and therefore behavior of all groups
- May only ask questions
- Focuses only on learning (individual, group and/or organizational) and clarification of problem, goal, strategy or action

Action Learning Coach

- Focus is on helping the group learn/improve, and not on helping to solve the problem
- Only ask questions

Question to begin action learning session
- (To problem presenter) Could you take a minute or so to tell us the problem or task that you would like the group to help you with?

Questions at first intervention (8-10 minutes into session)
- How are we doing as a group thus far? (Ask each member for a 1-2 word assessment; i.e., okay, not okay, great, etc.)
- What are we doing well?
- What could we do better?
- Do we have agreement on the problem – yes or no? Why don’t we all write it down? Is there agreement? Continue.

Questions at conclusion of session (20-25 minutes)
- (To the presenter) What action are you going to take as a result of this session? Were you helped? How?
- (To the entire group) What did we do best as a group? What was the quality of our questions? What did we learn about problem-solving? Team formation and development? Did any of us demonstrate any leadership behaviors? What did we learn that we could apply to our lives/organizations?
Characteristics of an Effective Learning Coach

- Trust the process and power of questions
- Ability to ask good questions, especially follow-up questions
- Intense listening skills
- Able to hear what is not being said
- Focused and concise
- “Helicopter” and outsider perspective
- Ability to be non-judgmental
- Tolerance of ambiguity
- Patience and empathy
- Openness

Facilitator vs. Learning Coach

1. Focus on group process and norms
2. Makes statements based upon expertise
3. Focus on what has happened
4. Fosters group dependence
5. Employs single-loop learning
   - Cybernetic, actual vs. desired learning
   - Cause and effect

1. Focus on learning and team performance
2. Asks reflective questions
3. Focus on why and how and action-consequence linkages
4. Fosters group independence
5. Emphasizes double-loop and deutero-learning
   - Cultivate skills of learning
   - Connects learning to larger business goals
### Facilitator vs. Learning Coach

<table>
<thead>
<tr>
<th>Facilitator</th>
<th>Learning Coach</th>
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<tbody>
<tr>
<td>6. Focus on the present/past</td>
<td>6. Focus on the future</td>
</tr>
<tr>
<td>7. Offers answers and provides suggested behavior</td>
<td>7. Trusts that group has better answers and insights</td>
</tr>
<tr>
<td>8. Generates dependent thinking</td>
<td>8. Fosters self-confidence and critical thinking</td>
</tr>
<tr>
<td>9. Power/use of statements leads to potential fear, distrust and/or defiance</td>
<td>9. Questions empower and create a comfortable, supportive, safe climate</td>
</tr>
<tr>
<td>10. Generates reaction</td>
<td>10. Generates reflection</td>
</tr>
<tr>
<td>11. Added value is group dynamics expertise and cleverness</td>
<td>11. Added value is generating individual perspectives and encouraging wisdom</td>
</tr>
<tr>
<td>12. People and group grow in the manner desired by facilitator</td>
<td>12. People grow into the future they need and desire</td>
</tr>
</tbody>
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### Integrating Action Learning into Larger Leadership Development Programs

(What I didn’t learn in Mike Marquardt’s books)

Skipton Leonard, Ph.D.

SIOP Presentation

April 15, 2005
What I didn’t learn in Mike’s books

- Identifying and defining Action Learning projects
- Embedding the learning in the organization
- Adjunctive designs and methods
- Employing action learning principles and methods in other program elements
- Embedding action learning in the larger leadership development design

Identifying and defining Action Learning projects

- Surfacing ideas for projects
  - Organization perceived needs
  - Participant perceived needs
  - Convergence of organization/participant needs

- Chartering process
  - Defining
  - getting organizational & participant buy-ins

- Case example
  - Action learning in prestigious research institute
Embedding the learning in the organization

- The necessity of senior management commitment and active support
- Organizational sponsors
  - Senior managers who have a stake in AL project success
  - Are willing to serve as champions as well as advisors
- Credibility of projects
  - The organization must demonstrate not just promise that good ideas will be implemented
- Co-coaching

Adjunctive designs and methods

- Supplementing the Socratic process
  - When not to withhold your expertise
  - How to provide information without undermining the process
- Action learning inspired adjunctive programming
- Technology and virtual attendance at team meetings
Employing action learning principles and methods in other program elements

- Two approaches to experiential learning
  - Content → experiential demonstration
  - Experiential challenges → surface opportunities for inductive learning
- Action learning principles and methods can effectively be employed in
  - Debriefing simulations and exercises
  - Coaching
  - Any opportunity for inductive learning
  - Recommend Mike’s up-coming book *Leading with Questions*

Embedding action learning in the larger design

**LEADERSHIP DEVELOPMENT PROGRAM**

- Org. Survey
- Core Leadership Program (individual focus)
- Action Learning
- Teamwork/Creativity Module
- Coaching

*Org. Survey*
- 360° Feedback
- Commencement
- Org. Survey
- Focused 360° Feedback
- Strategic Leadership Module (Org. focus)
Constellation Power Generation
Action Learning Process

Society for Industrial and Organizational Psychology

April 15, 2005

Constellation Energy – Who Are We?

- Number 203 on the Fortune 500 list
- Recently Named “Most Admired Energy Company in America” by Fortune Magazine
- Recently named “Best Place to Work” by Baltimore Magazine
Constellation Energy’s Business Model

- Focused on competitive markets in states where customers can choose suppliers
- In 22 competitive states & 3 Canadian provinces where utilities are no longer responsible for generating power that is delivered to customers.

Constellation Energy Revenues

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenues ($ Billion)</th>
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<tbody>
<tr>
<td>2002</td>
<td>$4.7B</td>
</tr>
<tr>
<td>2003</td>
<td>$9.7B*</td>
</tr>
<tr>
<td>2004E</td>
<td>$11.2B</td>
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Shareholder Value Creation

Price Appreciation (10/31/01 to 2/7/05)

Dividend Growth
- CEG: +130%
- S&P: +13%
- DJ Util.: +10%

2001: $0.48
2005: $1.34

Average annual total return of 32% since 10/31/2001

Constellation Power Generation

- Output from generating plants is sold by Constellation Commodities Group to premier wholesale customers.
- Generates reliable electricity under long-term contracts and spot market opportunities.
- Dispatches power to independent system operators as required to ensure reliability on the grid.
- Owns and operates generating capacity diversified by fuel, technology, and strategic geographic location.
### Action Learning Process in CPG

- Introduced Action Learning in late 2003
- Trained 160 participants in the process
- Trained approximately 30 AL learning Coaches
- Initiated approximately 25 AL teams
  - Safety processes
  - Work Schedules
  - Benefits
  - Pay Premiums
  - Budget and Cost Allocation

### Action Learning Process in CPG

- All First Line Leaders are introduced to Action Learning in their initial leadership training program
  - Four hour session allocated in the leadership program
  - Includes participation in an Action Learning team
- Conducted training sessions throughout our regions
- Begin each new team with a 30 minute “Getting Started” refresher
### Action Learning - Lessons Learned

- Attributes of the Learning Coach are critical
  - Articulate, able to paraphrase, restate and probe
  - Insightful regarding group dynamics
  - Secure in the presence of higher level leaders
  - Non-judgmental/open/accepting and supportive
  - Comfortable with inquiry and caring confrontation
  - Regarded by peers as trust worthy
  - Able to trust the group process

- Learning Coach is critical to the success of the team
  - Limit the number of Learning Coaches to provide them with ample opportunity to practice
  - The Learning Coach may need to begin sessions by training in AL principles for reinforcement
  - The Learning Coach should view AL as a process for building the organization’s culture
    - Learning and Inquiry
    - Respect, Inclusion
    - Stretch and Personal Growth
    - Boundary less (silo smashing)
Action Learning - Lessons Learned

- The Learning Coach should help the group bring their knowledge, skill and experience to the table
  - Get the group beyond sitting around the table asking questions
  - Invite them to assess their skills and abilities and ask how they may bring these to bear on the issue
  - Ask how they exercise leadership skills in the group
  - Intervene if no learning is occurring; this is a judgment call

Action Learning - Lessons Learned

- Make up of the group can present challenges
  - Keep to 8 person limit (I always regret exceeding this number)
  - Dominant personalities may become competitive - especially if more than one on the team
  - Managers that are skilled in directing, telling and executing rather than reflecting
  - Mixture of leaders and subordinates (vulnerability in the presence of subordinates is difficult for some)
Action Learning - Lessons Learned

- **Group Selection**
  - The majority of participants should be comfortable with reflection, inquiry and introspection this helps to set the group norms.
  - Include some members that have good process and organizational skills - this becomes important when the team moves into solution space.
  - Sometimes the AL coach will need to coach participants outside of the session, during breaks and between meetings.

Action Learning in CPG - Value Added

- Aligns well with the 7 elements of our Work Belief System (WBS)
  1. Results Focus
  2. Common Objectives
  3. Management by Principle
  4. Teamwork
  5. Multi-Skilling
  6. Total Task
  7. Problem Solving
Action Learning in CPG - Value Added

- Works very well in emotionally charged situations or where people have strong opinions
- Supports the concept of a Learning Organization
- Respects individuals and supports good interpersonal relationships
- Energizes people outside of the sessions

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