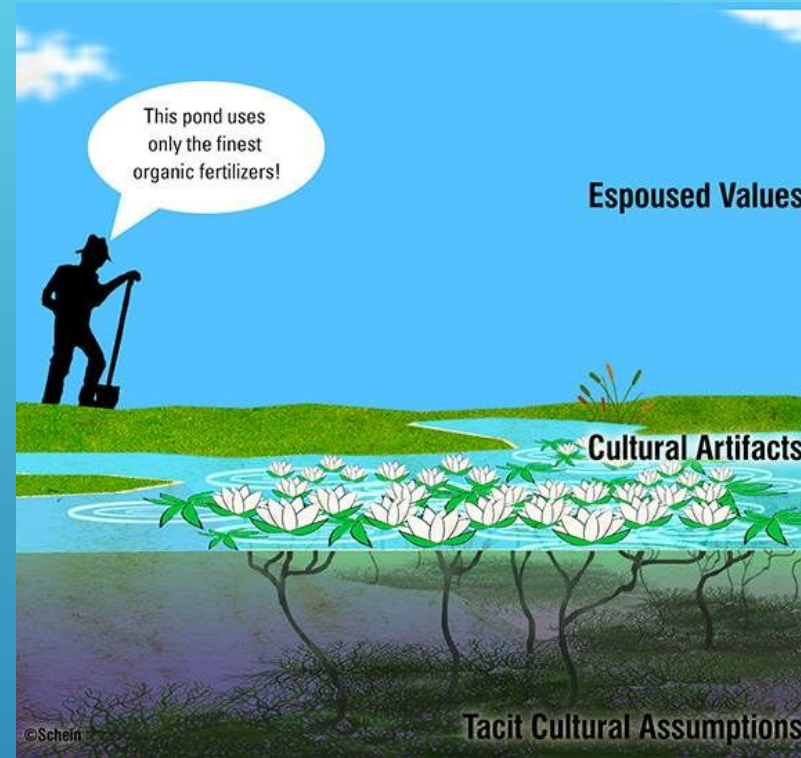


INCREASING THE SUSTAINABILITY OF ACTION LEARNING IN THE BETA CORPORATION

Sheila Person-Scott

Gardner-Webb University

- ▶ Beta corporation was experiencing significant change
- ▶ Desire to mimic the success in the organization that AL had in one of the lines of businesses
- ▶ Offer a learning experience for leaders internally, reducing the cost of external development



BACKGROUND AND PURPOSE

- ▶ Action learning is an enterprise offering; desired the project to have an organizational impact
- ▶ Desire to contribute to the success of the Organizational Effectiveness Group
- ▶ Believed in the concept and the impact on learning

BACKGROUND AND PURPOSE

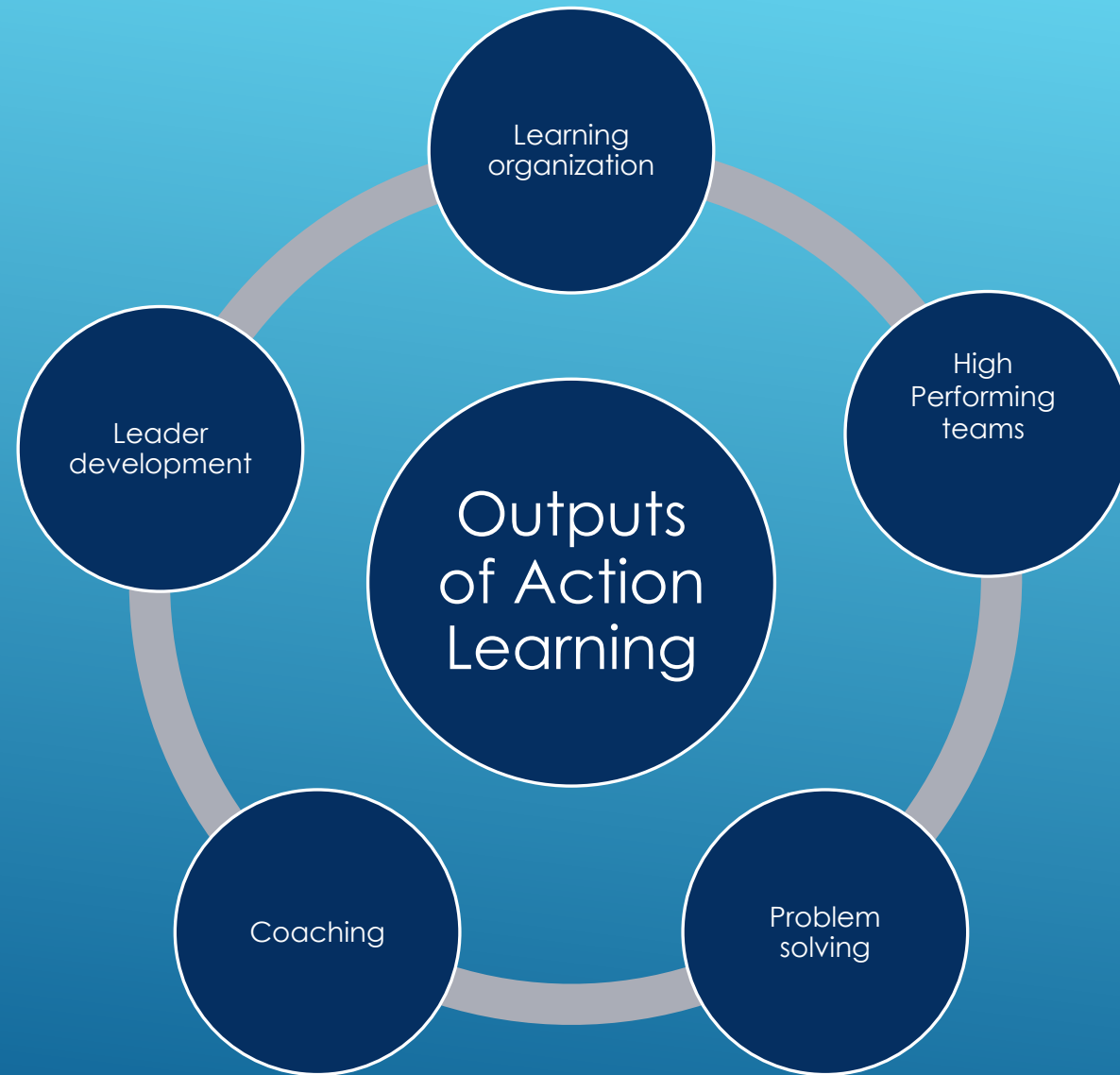
Action Learning is a tool that facilitates group learning while solving a problem with questioning and reflection with the support of an action learning coach

ACTION LEARNING DEFINED

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- ▶ Action Learning consists of six elements
 - ▶ A problem that needs to be solved
 - ▶ A team of individuals assigned to work on the problem
 - ▶ Questioning and Reflective Listening
 - ▶ Actions that will be taken to solve the problem
 - ▶ A willingness to learn
 - ▶ An action learning coach

ACTION LEARNING ELEMENTS



- ▶ Enhance user acceptance of Action Learning, (AL), in the Beta Corporation
- ▶ Assess the AL process to identify what is getting in the way of success
- ▶ Create an implementation plan that would position AL as a premier learning event

SCOPE AND APPROACH

- ▶ Work Plan consisted of five key areas:
 - ▶ Ensure vertical development is understood
 - ▶ Identify and source resources, (ensure the right people are on the bus)
 - ▶ Strategy to position AL as a premiere learning opportunity
 - ▶ Identify and clarify roles and responsibilities
 - ▶ Establish effective performance

WORK PLAN COMPONENTS

WORK PLAN

Phase	Activity	Detailed Strategy	Owner	Time elin	Dependencies/Notes
1	Ensure vertical development is understood	Identify areas that need enhancement to ensure that AL is understood and the implementation is successful	Consultant/Strategy Lead	2 w	
1a	Create tools to enhance leader knowledge and understanding	Create a glossary of terms, concepts and techniques to build a base line of knowledge	Program Manager	2 W	Partnership with TDOE Communications
1b	Identify areas that need enhancements	Review end to end process and determine areas of improvement needed	Strategy Lead Program Manager	3w	
2	Identify and source resources	Determine the process for selecting sponsors and sourcing problems	Program Manager, AL Advisory	1 m	
2b	Identify and source resources	Determine the number of and the skill level of coaches needed	Program Manager	3 w	
2c	Identify and source resources	Establish funding needed to acquire resources and deliver sessions	Program Manager	2 w	
2d	Identify and source resources	Determine requirements for coaches, (# of expected facilitations and adherence to the program design)	Program Manager, AL Advisory	2 w	
2e	Identify and source resources	Design, behavioral based selection process for the Program Manager to ensure the right talent is selected	Program Manager, Strategy Lead	1 m	
2f	Identify and source resources	Identify administrative support needs	Strategy Lead Program Manager	2w	
2g	Identify and source resources	Calculate the hard and soft cost of running an ad hoc AL session (various scenarios, excluding the team's time)	Program Manager	1 m	
3	Strategy to position AL as a Premier Learning Opportunity	Review pillars like Leader Behavior, Diversity and Inclusion, Culture, Leadership competencies in 360, Leader capabilities – show the alignment between AL and organizational values that will enhance our ability to meet our goal of providing exceptional service to our customers.	Strategy Lead Program Manager	2 w	
3a	Strategy to position AL as a Premier Learning Opportunity	Identify the key problem solving techniques that will be included in the forum (EXEC OVERVIEW)	Program Manager,AL Advisory Board	1 w	
3b	Strategy to position AL as a Premier Learning Opportunity	Umbrella theory, (collateral needs to be visited), show the connection between AL and other development strategies. AL encompasses the stand alone learnings that are acquired in other development offerings, such as D&I, Extraordinary Leader, Crucial Conversations and Transformational Leaders. AL allows the leader/learner to apply the knowledge was acquired in the offerings listed above. Provides a vehicle for integration for the learnings that were achieved.	Strategy Lead Program Manager	2 w	
3c	Strategy to position AL as a Premier Learning Opportunity	Develop a communication strategy to bring awareness leaders on AL, position AL as a "umbrella" that is overarching and incorporates learnings from other key learning events. Highlight how skills learned in D&I, Extrordinary leader, Crucial Conversations, etc. can be practiced in solving problems using AL	Communication Person Program Manger, Strategy Lead	3 w	Depends on all tasks in Strategy to Position aL as a Premier Learning Opportunity
3d	Strategy to position AL as a Premier Learning Opportunity	Design a forum (EXEC OVERVIEW) that will enable attendees and HR Consulting team to understand various components of AL and provide insight to team members of leaders who participated in an Action Learning Experience.	Strategy Lead Program Manager	1 m	
3e	Strategy to position AL as a Premier Learning Opportunity	Provide tools to leaders attending AL forum (EXEC OVERVIEW) that they can use in the workplace after attending forum.	Strategy Lead Program Manager	1 d	will be designed as part of Designing the Exec Overview/Forum
3f	Strategy to position AL as a Premier Learning Opportunity	Identify skills that can be developed through AL and skills that will be practiced in AL.	Program Manager, AL Advisory	3w	
3g	Strategy to position AL as a Premier Learning Opportunity	Socialize content of communication strategy during Talent Mangement Process and create a communication that can be highlighted in the HR Weekly	TDOE Communications, Program Manager	1m	
4	Identify and Clarify roles and responsibilities	Communicate expectations and roles and responsibilities of all stakeholders (infrastructure people)	Strategy Lead Program Manager	3 w	Assume initiating com strategy will take time to move through
4a	Identify and Clarify roles and responsibilities	Provide performance feedback to coaches and their managers	Strategy Lead Program Manager	1 h	this will happen in short events over time
4b	Identify and Clarify roles and responsibilities	Provide stakeholders with information concerning the commitment required (assuming stakeholders at enterprise and NOT the participants or sponsor in a specific event.	Strategy Lead Program Manager	1 w	
4c	Identify and Clarify roles and responsibilities	Underscore leadership accountability and the connection to performance management	Strategy Lead Program Manager	1m	
4d	Identify and Clarify roles and responsibilities	Orient participants to AL process and outcomes	Strategy Lead Program Manager	1m	
5a	Establish effective performance measures	Revise survey instrument with the necessary enhancements to ensure desired outcomes are met	Strategy Lead Program Manager	2m	
5b	Establish effective performance measures	Align survey document to desired outcomes	Strategy Lead Program Manager	2m	
5c	Establish effective performance measures	Analyze new survey's effectiveness	Strategy Lead Program Manager	1m	
5d	Establish effective performance measures	Measure skill retention and application after 30, 60, 90 days	Strategy Lead Program Manager	2m	

- ▶ Organization priorities took precedence over AL
- ▶ Funding for AL was delayed
- ▶ Trained coaches reported in different areas of the organization
- ▶ Research data was limited
- ▶ No AL event was scheduled to observe

Probability

Very High	Very Low/ Very High	Low/ Very High	Medium/ Very High	Coaches may not have the capacity to support AL	Lack of Role Clarity
High	Very Low/ High	Low/ High	Medium/ High	Inability to continuously source problems with influential sponsors	Strategy missing with critical measures and outcomes
Medium	Very Low/ Medium	Low/ Medium	Medium	No dedicated resources to support implementation of the program	Very High/ Medium
Low	Very Low/ Low	Vertical Development not understood by leaders	Medium/ Low	High/ Low	Very High/ Low
Very Low	Very Low	Low/ Very Low	Medium/ Very Low	High/ Very Low	Very High/ Very Low
	Very Low	Low	Medium	High	Very High

Impact

RISKS AND CONSTRAINTS

Plan Do Study Act



- ▶ Clear measurements that will indicate the success of AL
- ▶ Clients, coaches and participants will understand their responsibilities
- ▶ Defined approach to initiate an AL engagement
- ▶ Realize the effectiveness of AL and how it encompasses the other key learning strategies

BENEFITS THAT WILL BE REALIZED

- ▶ Meet at least three times with the leader of the group during the project
- ▶ Communication is critical between consultant and site manager
- ▶ Revisiting outcomes throughout the project to ensure that organizational changes have not impacted outcomes
- ▶ Create and agree upon a meeting schedule
- ▶ Meet with partners, advisory, and clients

REFLECTION

- ▶ What type of problems should the AL cohort solve?
- ▶ What is the financial impact of the recommendations?
- ▶ How does organizational change impact the support of leadership learning?
- ▶ Are the skills learned, (questioning and reflection), incorporated in the leader's behavior?

AREAS OF FUTURE STUDY

- ▶ Collins, J. C. (2001). *Good to great*. London: Random House Business.
- ▶ Marquardt, M. J., Banks, S., Cauweiler, P., & Ng, C. S. (2018). *Optimizing the power of action learning: Real-time strategies for developing leaders, building teams and transforming organizations*. London: Nicholas Brealey Publishing.
- ▶ Schein, E. H. (2017). *Organizational culture and leadership*. Hoboken: Wiley.

RESOURCES

QUESTIONS?

