

**ACTION LEARNING -  
THE CORNERSTONE FOR BUILDING A LEARNING ORGANIZATION**  
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Senge (1990) states that a learning organization must be able to integrate work with learning, that only through continuously reflecting on our activities can we become a learning organization. Perhaps no tool is more effective in building a learning organization than action learning (Marquardt and Carter, 1998). Lex Dilworth (1995) has called action learning "the DNA of a learning organization" since action learning both enables and forces organizations to continuously learn on an organization-wide basis and thereby be better able to adapt to the continuously changing environment. As Reg Revans (1982), the founder of action learning notes, action learning creates "constant learning opportunities for people. It creates a culture and morale for learning."

**WHAT EXACTLY IS ACTION LEARNING?**

Simply described, action learning is both a dynamic process and a powerful program. It involves a small group of people solving real problems, while at the same time focusing on what they are learning and how their learning can benefit each group member, the group itself, and the organization as a whole (Marquardt, 1999).

Action learning program derives its power and benefits from six interactive and interdependent components. The strength and success of action learning is built upon how well these elements are employed and reinforced.

**1. A problem (project, challenge, opportunity, issue or task)**

Action learning is built around a problem (be it a project, a challenge, an issue, or task), the resolution of which is of high importance to an individual, team and/or organization. The problem should be significant, be within the responsibility of the team, and provide opportunity for learning. Why is the selection of the problem so important? Because it is one of the fundamental beliefs of action learning that we learn best when undertaking some action, which we then reflect upon and learn from. The main reason for having a problem or project is that it gives the group something to focus on that is real and important, that is relevant and means something to them. It creates a "hook" on which to test stored-up knowledge.

**2. An action learning group or team**

The core entity in action learning is the action learning group (also called a set or team). The group is composed of 4-8 individuals who examine an organizational problem that has no easily identifiable solution. Ideally, the make-up of the group is diverse so as to maximize various perspectives and to obtain fresh viewpoints. Depending upon the type of action learning problem, groups can be composed of individuals from across functions or departments. In some situations, groups are comprised of individuals from other organizations or professions; for example, the company's suppliers or customers.

**3. A process that emphasizes insightful questioning and reflective listening**

By focusing on the right questions rather than the right answers, action learning focuses on what one does not know as well as on what one does know. Action learning tackles problems through

a process of first asking questions to clarify the exact nature of the problem, reflecting and identifying possible solutions, and only then taking action.

Action learning employs the formula:  $L = P + Q + R$ ; i.e., Learning = **Programmed** knowledge (i.e., knowledge in current use, in books, in one's mind, in organization's memory, lectures, case studies, etc.) + **Questioning** (fresh insights into what is not yet known) plus **Reflection** - recalling, thinking about, pulling apart, making sense, trying to understand).

#### **4. A resolution of taking action**

For action learning advocates, there is no real learning unless action is taken, for one is never sure the idea or plan will be effective until it has been implemented. Therefore members of the action learning group must have the power to take action themselves or be assured that their recommendations will be implemented, (barring any significant change in the environment or the group's obvious lack of essential information). Action enhances learning because it provides a basis and anchor for the critical dimension of reflection described earlier.

#### **5. A commitment to learning**

Solving an organizational problem provides immediate, short-term benefits to the company. The greater, longer-term, multiplier benefit, however, is the learning gained by each group members and how the group's learnings can be applied on a systems-wide basis throughout the organization. The learning that occurs in action learning has greater value strategically for the organization than the immediate tactical advantage of early problem correction. In action learning, the learning is as important as the action. Action learning places equal emphasis on accomplishing the task and on the learning/development of individuals and organizations.

#### **6. A group facilitator**

Facilitation is important to help the group slow down their process in order to allow sufficient time to reflect on learning. A facilitator may be a working group member (possessing familiarity with the problem being discussed) or an external participant (not necessarily understanding the problem content or organizational context, but possessing action learning facilitation skills).

The facilitator is very important in helping participants reflect both on what they are learning and how they are solving problems. He/she helps group members reflect on how they listen, how they may have reframed the problem, how they give each other feedback, how they are planning and working, and what assumptions may be shaping their beliefs and actions. The set advisor also helps participants focus on what they are achieving, what they are finding difficult, what processes they are employing and the implications of these processes.

### **How Action Learning Contributes to Building a Learning Organization**

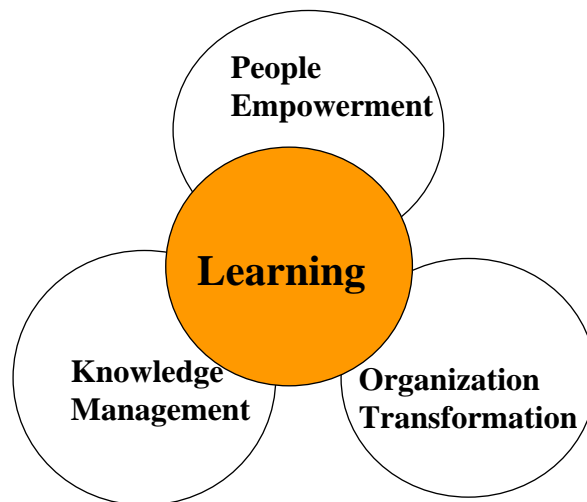
Each of these six components contribute to the building of a learning organization due to the fact that action learning:

- is designed to systematically transfer knowledge throughout the organization
- enables people to learn by doing
- helps develop learning how to learn skills
- encourages continual learning
- creates a learning culture where learning becomes a way of life
- is an active rather than a passive approach
- is done mainly on the job rather than off the job

- allows for mistakes and experimentation
- develops skills of critical reflection and reframing
- is a mechanism for developing learning skills and behavior
- demonstrates the benefits of organizational learning
- models working and learning simultaneously
- is problem-focused rather than hierarchically bound
- provides network for sharing, supporting, giving feedback and challenging assumptions
- develops ability to generate information
- breaks down barriers between people and across traditional organizational boundaries
- helps an organization move from a culture of training (in which someone else determines and provides your development) to a culture of learning (in which everyone is responsible for their own continuous learning)
- is systems-based
- applies learnings to other parts of the organization as appropriate (Marquardt and Reynolds, 1994; Marquardt, 1999)

#### **FOUR SUBSYSTEMS OF THE LEARNING ORGANIZATION**

Each of these characteristics is part and parcel of the systems approach of viewing a learning organization. In this systems learning organization model (Marquardt, 1996), there are four subsystems 1) learning dynamics, 2) organization transformation, 3) people empowerment, and 4) knowledge management that interface and support one another, all of which are strengthened via action learning (see figure 1)



### **LEARNING ORGANIZATION MODEL**

#### **1. Learning Subsystem**

The learning subsystem refers to a) levels of learning, b) types of learning and c) learning skills.

### a. Levels of Learning

There are three levels of learning present in learning organizations:

**Individual learning** refers to the change of skills, insights, knowledge, attitudes and values acquired by a person through self-study, technology-based instruction, and observation.

**Group or team learning** alludes to the increase in knowledge, skills and competency that is accomplished by and within groups.

**Organization learning** represents the enhanced intellectual and productive capability gained through corporate-wide commitment and opportunity to continuous improvement. It differs from individual and group/team learning in two basic respects. First, organizational learning occurs through the shared insights, knowledge and mental models of members of the organization. Second, organizational learning builds on past knowledge and experience, on organizational memory that depends on institutional mechanisms (e.g., policies, strategies, and explicit models) used to retain knowledge.

### b. Types of learning

There are several types or ways of learning that are of significance and value to the learning organization. Although each type is distinctive, there is often overlap and complementarity of the various types. Therefore, a particular learning occurrence may be classified as being of more than one type.

**Adaptive learning** is learning from the experience and reflection. **Anticipatory learning** is the process of acquiring knowledge from expecting the future (a vision-action-reflection approach) whereas **generative learning** is the learning that is created from reflection, analysis or creativity. **Single-loop, double loop and deuterio learning** are types of learning are differentiated by the degree of reflection placed on action that has occurred in the organization.

### c. Skills of organizational learning

Four key skills are needed to initiate and maximize organizational learning, namely,

**Systems thinking** which represents a conceptual framework one uses to make full patterns clearer, and to help one see how to change them effectively

**Mental models** are the deeply ingrained assumptions that influence how we understand the world and how we take action. For example, our mental model or image of learning or work or patriotism impacts how we relate and act in situations where those concepts are operating.

**Personal mastery** indicates the high level of proficiency in a subject or skill area. It requires a commitment to lifelong learning so as to develop an expertise or special, enjoyed proficiency in whatever one does in the organization

**Dialogue** denotes the high-level of listening and communication between people. It requires the free and creative exploration of subtle issues, a deep listening to one another and suspending of one's own views. The discipline of dialogue involves learning how to recognize the patterns of

interaction in teams that promote or undermine learning. For example, the patterns of defensiveness are often deeply ingrained in how a group of people or an organization operates. If unrecognized or avoided, they undermine learning. If recognized and surfaced creatively, they can actually accelerate learning. Dialogue is the critical medium for connecting, inventing and coordinating learning and action in the workplace.

### **How Action Learning Builds the Learning Subsystem**

Action learning programs encourage and enable significant levels of learning to occur at the team and individual levels during the action learning sets. Perhaps, there is no greater demonstration of true team learning than what occurs during such set meetings where the entire group is developing common basic assumptions, common understanding of the problem and common growth in developing new knowledge. Usually, at the end of the action learning meeting, the set seeks to identify ways in which its learning can be applied to the organization and thereby create organization-wide learning.

All types of learning are sought and developed in action learning programs. In reflecting on past actions, the group attempts to adapt the new action to better respond to the environment. Anticipatory learning is acquired through the group's analysis of a variety of possible future scenarios or impacts of various actions. Almost continuously, action learning sets are generating innovative, new creative knowledge. Finally, the time and space provided for deep and frequent reflection during the action learning sets provides the avenue for single, double, and even deuterio learning.

Action learning provides the opportunity for people in the organization to build each of these learning disciplines. In action learning sets we can reflect on our actions and the assumptions that underlie them. Action learning promotes "a depth and intensity of dialogue that is uncommon in the normal life experience." (Dilworth, 1998).

Revans (1982) notes that it is the "social dimension of action learning that provides the challenge to misconceptions and ingrained mental schemata which predispose a person to overlook the ways in which he/she needs to change." In action learning we can explore real problems in a non-defensive way with supportive colleagues who feel free to criticize, question and advise. Inherent in this approach is the ability to acknowledge that we frequently act in ways that may be incongruent with what we espouse.

## **2. Organization Subsystem**

The second subsystem of a learning organization is the organization itself, the setting and body in which the learning itself occurs. The four key dimensions or components of this subsystem are vision, culture, strategy, and structure

**Culture** refers to the values, beliefs, practices, rituals and customs of an organization. It helps to shape behavior and to fashion perceptions. In a learning organization, the corporate culture is one in which learning is recognized as absolutely critical for business success, where learning has become a habit and an integrated part of all organizational functions. This rich adaptable culture creates integrated relationships and enhances learning by encouraging values such as teamwork, self-management, empowerment and sharing. It is the opposite of a closed, rigid, bureaucratic architecture. Risks are encouraged and past methods are to be challenged.

**Vision** captures a company's hopes, goals, and direction for the future. It is the image of the organization that is transmitted inside and outside the organization. In a learning organization it

depicts and portrays the desired future picture of the company in which learning and learners create continuously new and improving products and services. A shared company vision is one that fosters genuine commitment and enrollment rather than compliance.

**Strategy** relates to the action plans, methodologies, tactics and steps that are employed to reach a company's vision and goals. In a learning organization, these are strategies that optimize the learning acquired, transferred and utilized in all company actions and operations.

**Structure** includes the departments, levels, and configurations of the company. A learning organization is a streamlined, flat, boundaryless structure that maximizes contact, information flow, local responsibility and collaboration within and outside the organization.

### **How Action Learning Builds the Organization Subsystem**

The culture created in action learning programs is one where learning is the most important and valuable objective. Throughout the action learning process there is an emphasis on how the group can continue to expand upon and speed up their knowledge and learning capacities. Members are encouraged and expected to take risks and try new ways. They recognize that much of the greatest leaps in learning have come from learning from mistakes made.

Garratt (1991) remarks how action learning is particularly valuable in helping organizations develop a vision and culture committed to continuous learning. Schein (1993), a pioneer in understanding organizational culture and organizational change, notes that "for change (learning) to occur, the organization must unlearn previous beliefs, be open to new inputs and relearn new assumptions and behaviors." Action learning is a powerful tool in helping to change these values and create these new visions.

Action learning organizations have a bias for reflection-in-action. The capacity to quickly take action and to generate information is critical to organizations. Senge (1990) observes that "learning cannot exist apart from action. Action provides a basis for the critical dimension of reflection." It is the expressed strategy of an action learning program to build in time, space and opportunities for learning. And no strategy is more powerful for producing organization-wide learning than getting large numbers of employees involved in action learning programs.

The structure of an action learning set is very fluid and flexible. Keeping the flow of questions and knowledge as clear and complete as possible is critical in processes such as reframing the problem, identifying possible actions, and providing frank feedback to one another. Needless protocol and bureaucracy and administrative trivia are discouraged. Leadership flows easily throughout the group.

### **3. People Subsystem**

The people subsystem of the learning organization includes employees, managers/leaders, customers, business partners (suppliers, vendors, and sub-contractors) and the community itself. Each of these groups is valuable to the learning organization, and all need to be empowered and enabled to learn.

**Employees** as learners are empowered and expected to learn, to plan for their future competencies, to take action and risks, and to take the initiative to solve problems. In learning organizations, they should be treated as mature, adult learners and be given authority and responsibility according to their learning capacities.

**Managers/Leaders** as learners carry out coaching, mentoring, and modeling roles with a primary responsibility of generating and enhancing learning opportunities for people around them. In addition to managing people, they should become proficient at managing knowledge. Revans (1980) once remarked, "encouraging autonomous learning is not managerial abdication." And finally, leaders should become champions of learning projects, including action learning programs

**Customers** can be a valuable source of information and ideas. They should thus be closely linked into the learning system and strategy of the organization. When possible, they should be offered training so as to become wiser customers and better able to advise relative to their future expectations from the company.

**Partners, suppliers, and dealers** as learners can receive and contribute to instructional programs. They can also benefit by sharing competencies and knowledge with the organization. Learning from and with suppliers, dealers, and partners should be a regular strategy of learning organizations.

**Community groups** as learners include social, educational and economic agencies that can share in the providing and receiving of learning. Involving the potential diversity of all these groups enhances product and service development.

### **How Action Learning Builds the People Subsystem**

Action learning recognizes the importance of involving people from throughout the business chain in the problem-solving process. Action learning sets are most effective when customers, suppliers, and interested community members come together to ask fresh questions and share fresh perspectives.

Empowering people to take responsibility for themselves rather than waiting for outside expertise is a key value of action learning. Limerick et al. (1994) point out that there is within action learning programs "the explicit recognition that management's role is to provide continuous opportunities for employees' self-development."

Pedler (1991) notes that in learning organizations, a primary task of managers is to facilitate the staff's learning from experience. Through the experience of action learning, managers will recognize the importance of making time for seeking feedback, for obtaining data from a variety of perspectives, for encouraging new actions for old and new problems. They will also perceive the value in questioning their own ideas, basic assumptions, attitudes and actions.

Building learning alliances help organizations to achieve continuous improvement and develop the capacity to cope with discontinuous change. Learning from fresh faces is critical for success in action learning as it is in organizations. New partner and perspectives can:

- enlarge the range of the continuous environmental scanning ability of those in the alliance
- bring a wide analytical range, and a wider range of assumptions to the learning process, so that discontinuities are more likely to be recognized
- help member recognize and overcome defensive routines so that they can be more transcendent.
- take place at multiple levels within the alliance, and improve the learning of all members
- open up the boundaries of the organization, and make possible completely new organizational forms, constantly open to importing chaos and evolving new forms of order (Limerick et al., p. 36)

The origins of action learning can be traced to the creation of a learning alliance among colliery managers in Britain following nationalization of the British coal industry. Revans describes how he established a group of 22 managers, drawn from pits in England and Wales, to work together over 3 years on problems they identified as critical to their operations. Revans also developed alliances between medical professionals across a number of London hospitals and will as a learning community through a consortium of leading industrial organizations in Belgium

#### 4. Knowledge Subsystem

The knowledge subsystem of a learning organization refers to the management of acquired and generated knowledge of the organization. It includes the acquisition, creation, storage, transfer and utilization of knowledge.

**Acquisition** refers to the collection of existing data and information from within and outside the organization via benchmarking, conferences, environmental scans, Internet, use of consultants, publications, and research

**Creation** involves new knowledge that is created within the organization through problem solving and insights as well as the conversion of tacit and explicit knowledge. Experimentation, demonstration projects, and reflecting on past and current programs increase the innovativeness of the company.

**Storage** is the coding and preserving of the organization's valued knowledge for easy access by any staff member, at any time, and from anywhere. The knowledge should be categorized according to learning needs, work objective, user expertise, and function. It needs to be structured and stored so that it can be found and delivered quickly and accurately.

**Transfer and utilization** includes the mechanical, electronic and interpersonal movement of information and knowledge, both intentionally and unintentionally, throughout the organization as well as its application and use by members of the organization.

The knowledge elements of organizational learning are ongoing and interactive instead of sequential and independent. The collection and distribution of information occurs through multiple channels, each having different time frames. An example is an on-line newsletter, which systematically gathers, organizes, and disseminates the collective knowledge of the organization's members.

**Technology** is needed to quickly and adequately implement all four stages of the knowledge management. Technology includes the supporting, integrated technological networks and information tools that allow access to and exchange of information and learning. It includes technical processes, systems, and structure for collaboration, coaching, coordination, and other knowledge skills. It encompasses electronic tools and advanced methods for learning, such as computer conferencing, simulation, and computer supported collaboration. All these tools work to create knowledge freeways. Good knowledge management is not possible with the use of technology.

#### How Action Learning Builds the Knowledge Subsystem

**Acquiring Knowledge:** Action learning organizations are information-rich. In action learning sets members recognize the importance of acquiring information not only from external resources but also the value of tapping the tacit, internal wisdom and experience of each other. The internal

networks developed in action learning sets heighten the awareness of organizational resources, facilitate exchanging and sharing of ideas, and generates knowledge.

**Creating Knowledge:** Participants in action learning programs understand that they should seek new ways of solving old problems, that the old knowledge may no longer be sufficient. Thus, members are constantly creating new knowledge and to encourage innovation within the set. Nonaka (1994) suggests that information creation is a fundamental requirement for the self-renewing (i.e., learning) organization. An autonomous self-organizing group begins to be realized when members are given the freedom to combine thought and action at their own discretion and are thereby able to guarantee the unity of knowledge and action. The actions of action learning clarify and generate meanings.

**Storing Knowledge:** Knowing knowledge to store and why is based upon the organization's ability to make sense of the data encompassing and surrounding it. The company must then develop sense-making categories for coding and retaining value-added knowledge. Through its ongoing reflection on learning and the knowledge acquired, action learning programs lends themselves well to the Kantian school of thinking which "positions sense-making above mere sensing" (Botham and Vick, 1998). By reflecting on action, the set develops the ability to "make meaning" of the data collected and stored.

**Transferring and Testing Knowledge:** During the reflection periods, self-learnings become more explicit and intentional. Set members capture and store for themselves the knowledge and wisdom that will help them become better in both their professional and personal lives. Finally, action learning groups continuously seek ways in which they can transfer the learnings, wisdom, and experience gained in resolving the set's problem(s) to the organizations and communities in which they work.

### **Action Learning – The Cornerstone of a Learning Organization**

Learning quickly and systematically is critical for surviving in the 21st century. The organization that makes learning its core business can rapidly leverage its new knowledge into new products, new marketing strategies, and new ways of doing business. Learning organizations will become the only place where global success is possible, where quality is more assured, and where energetic and talented people want to be. More and more organizations are seeing action learning as the vehicle to help them become learning organizations and to arrive safe and well into the next century.

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