Definition: Action Learning

A process where participants learn by working together on real organizational problems, proposing actions and implementing solutions.
Four Objectives

1. Application of LDP
2. Practice and develop new leadership skills
3. Model for building effective teams
4. Value-added to organization
Action Learning Project Selection

- Organization identifies Action Learning Project (ALP)
- Solve a real problem / challenge / opportunity
- Organizational-wide impact
- Significant and substantial
- Must be a team project
- Identify a Team leader
Project Selection

Options 1:
• CEO/exec team assigns project
• LDP team may have input

Option 2:
• LDP participants identify options
• Get feedback and input from CEO and executive
Project Selection— 5 Criteria

1. Real organizational strategic opportunity to address
2. Team project and Structure
3. Feasible:
   — Within the competency of team
   — Resources available
   — Authority
4. If an operational initiative to be executed, still built around addressing a challenging dilemma(s)
5. Clear learning transfer opportunity
Project Success

Measured in two ways:

1. Outcomes (Impacts) on the organization
2. Lessons Learned by Team
ALP Process

- The Learning Equation: \( L = P + Q + R^* \)
  - The learning (L) that takes place in an ALP:
    - Program Knowledge (P)
    - Questioning (Q)
    - Reflection (R)

*Adapted from Marquardt, M.J. (1999) *Action Learning in Action: Transforming Problems and People for World-class Organizational Learning.*
ALP Process Questions & Reflection

Six Initial Questions

1. What is the organization seeking to accomplish?
2. What is stopping the organization from accomplishing it?
3. What is the organization doing about it?
4. Who knows what we are trying to do (i.e., who has the real facts)?
5. Who cares about getting the solution implemented (who has a vested interest in getting the problem solved)?
6. Who can get the solution implemented (who has the power)?
Key Players & Roles and Responsibilities

• Senior Management Team
• Sponsor
• Team Leader
• FCC Services Facilitators
Sample Learning Project Topics

- Employee Development and Training
- External Communications
- Internal Communications
- Loan Servicing
- Market Segmentation
- Employee Engagement
- Financial Analysis Program
- Loan Documentation Process
- Workplace Flexibility

- Sustaining Through Periods of Slow Growth
- Making Virtual Operations a Reality
- Mentoring Program
- Onboarding Program
  - M&A Analysis
  - Integration Planning / Playbook
ALP Assignments

Between Session 1-2
ALP Project Outline (bring to session)
• Polarity map of ALP polarity
• Discuss:
  — Decision Mojo Decision Traps
  — LSI Insights for team and organization
• Webinar/call with each team will be scheduled:
  — With me and/or other FCC Services Facilitator
ALP Assignments

Session 2 (See ALP Schedule for details)
Informal Presentation (approx. 20-30 min)—no PowerPoint necessary

• Project summary/overview (5 min)
• Polarity Map review (5 min)
• Decision Mojo reflection (5 min)
• Leadership insights—individual &/or group (5 min)
• Q&A (10 min)

Between Session 2-3
— Refine Causal Loop Diagram (if necessary)
— KAI understanding
— Discuss
  • How you individually see your and others’ EI tendencies playing out in the ALP
ALP Assignments

Session 3 (See ALP Schedule for details)
- Informal Presentation (approx. 20-30 min)—no PowerPoint necessary
  - Project update (5 min)
  - Leadership Insights (suggested topics) (10 min)
  - Q&A (10 min)

Between Session 3-4 (See ALP Schedule for details)
- Complete Project
- Discuss
  - How have applied what you’ve learned about leading teams to your ALP?
  - What lessons around leading change and transition have you been able to incorporate in your project? What impact did you see?
ALP Assignments

Session 4

- Final Presentation (approx. 40 min)
  - Project Summary & results and feedback from your organization (10 min)
  - Primary leadership insights (potential areas to discuss) (15 min)
  - Next Steps (if applicable) (5 min)
  - Q&A (10 min)

- Present Project to Senior Leadership Team
  - (and to others as appropriate)
  - Presentation can occur either prior to or after Session 4
ALP Questions

Six Initial Questions

1. What is the organization seeking to accomplish?
2. What is stopping the organization from accomplishing it?
3. What is the organization doing about it?
4. Who knows what we are trying to do (i.e., who has the real facts)?
5. Who cares about getting the solution implemented (who has a vested interest in getting the problem solved)?
6. Who can get the solution implemented (who has the sponsorship and authority/power)?
Schedule for Today

- Your ALP (each association):
  - What do you know?
  - What are your expectations?
  - What hurdles do you see?
  - What resources are available

- Group Discussion of each ALP

- ALP Polarity Map(s)