CERTIFICATION FOR ACTION LEARNING COACH PROJECT
(Sample Paper)

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1. Introducing Action Learning

1.1 Introducing Action Learning to the organization:

A half day demo program was conducted. The 2 ground rules and 6 components were presented along with the benefits of Action Learning.

For this organization, Leadership Development was particularly important so extra emphasis was placed on that. A fish bowl exercise was done to demonstrate the process – both in terms of coaching and problem-solving. The participants were queried to identify a real and urgent challenge. This person became the problem presenter. Volunteers for the team were selected, by simply asking for volunteers. The volunteers and the problem presenter were identified as the participants and everyone else as the peanut gallery. The peanut gallery was asked to silently observe the process as it unfolded. The observers of the fish bowl demonstration were asked to observe the participants for certain behaviors – particularly: great questions, demonstrating leadership competencies, and building on the questions of others.

After debriefing the demonstration and introducing the benefits of Action Learning, the attendees were divided in to teams. Each team was asked for someone to volunteer to be the coach and someone to volunteer to be the problem presenter. The volunteer coaches were given a copy of the WIAL approved script. As the Uber Coach, I took care of the time keeping and encouraging the teams to move on at the appointed times for check-ins.

Each of the problem presenters indicated they were significantly helped. And each of the coaches expressed the challenges of coaching. Several of the higher ranking participants expressed how this could be effectively used within their departments.

1.1.1. How the sponsor was approached

As a result of the introductory sessions, several participants expressed a need for the process within their departments. After conferring with each of them and determining who was most

likely to follow through on an actual engagement, I agreed to work with a team that had a particularly interesting challenge.

1.1.2. How participants were selected

There were many participants with a vested interest. It was agreed that the most equitable selection process was to put the names of all those that wanted to participate in a hat. The names that were drawn would constitute the team. There were a number of participants that were interested from the perspective of the presented problem and others that were curious about the process. It was determined that those that were most curious about the process would make great pizza people. With our inaugural team identified – we set out to solve the problems of the world … or at least those that the problem presenters put forward.

1.1.3. How participants were trained

Given the simplicity of Action Learning, it shouldn't take much to train participants. I decided it would be useful to present to them many of the challenges I've seen over time and put together a 60 minute presentation on the process, the benefits, the ground rules, the 6 components, establishing norms, etc.

The team was very attentive during the presentation and I was sure they were going to be the best Action Learning team in the history of Action Learning. I knew with certainty that this team wasn't going to fall into any of the pitfalls that most Action Learning teams experience the first time they attempt Action Learning.

1.2. Introducing Action Learning to the Team

All the team members were part of the earlier training I had done, so they knew what was expected of them. Between the first session and the second session I realized that the extensive presentation I did for the team was more about my needs. As they weren't intent on becoming coaches and truly just wanted to solve the problem I could have spent much less time in presentation, and more time allowing them to learn while experiencing the process.

1.2.1. Process

In the first session, I started by reading the First Session portion of the script. The team was very patient while we went through this process. I could tell they were very antsy since they had heard it all before.

In the second session I started by reading the subsequent portion of the script.

1.2.2. Leadership Skills

In the first session, I spent a significant amount of time explaining what leadership skills. I wanted to be sure that the team had a clear understanding of what I was looking for.

By the second session, I realized all of the previous prep I had done was for me. The team did not need nearly as much as I needed to give them.

2. Action Learning project(s) Description

The project consisted of 2 three hour sessions, conducted offsite to insure the participants weren't tempted to attend to their everyday tasks. The first session was conducted one afternoon, the second session the following morning. The first session reach clear solutions. The second session started to look at the larger problem that the first problem uncovered.

2.1. Problem presented

We need a better shift schedule to cover 24 hours a day / 6 days a week at the plant. Currently we are working three 8 hour shifts, six days per week. None of the staff is happy with this schedule, but it is too hard to come up with an equitable schedule. Mathematically, we are seeing a number of possibilities, but they are not fair to all the workers at the plant.

2.2. Problem after Consensus

The staff is angry that these shift schedules are always being inflicted upon them. There are only 12 guys that work at this plant, but management likes to just make decisions and tell us what to do.

2.3. How the Problem Presenter was helped.

The problem presenter was helped because he realized that where he thought the workers were angry because of the shift schedules, they were really angry because they had no say in what immediately impacted them. The shift schedule was a small element of the communication problem at this plant.

For the second session we started to explore what additional communications avenues needed to be addressed.

2.4. Actions to be taken

From the first session the team identified three potential solutions that were acceptable to both management and the owners and sent these back to the teams to vote on. This one step towards inclusive communication had a tremendous impact in improving the culture.

Longer term the teams will look at other ways to improve the communication.

3. Learnings

3.1. Challenges encountered completing the project

The sponsor of the project knew he was going to have a hard time selling Action Learning to the organization.

3.1.1. How did you address them?

We opted to do the first sessions just with his team so that he would be able to give the ok for any solutions the team came up with.

3.1.2. Upon reflection - how could you have better addressed them?

This worked very well. Also, since the sponsor was also the champion for Action Learning he had complete control over enforcing participation of the team members. All participants were good about physically being at all meetings.

3.2. Intervention opportunities

a) The cross section of leadership on this team was daunting, being that there were 4 levels of management present. The Vice-President that was there kept dominating the conversation; I found it very difficult to intervene to help balance the conversation.
b) The flip side of this challenge was the newest line manager that was there was not participating.
c) All of the team members were required to participate in the session, the body language upon arrival made it clear that they were not happy about being there.
d) All of the questions were directed to the Vice-President. He gave long complex answers, regardless of the question that was asked. I recognized most of the questions were closed questions, but let the Vice-President expound well beyond the information that was requested.

3.2.1. How did you address them?

a, b & d) I waited a long time to intervene as I didn't want to tell the Vice-President he was talking too much. We were at least 45 minutes into the session, when I realized I had to do something about this imbalance of participation. When I finally intervened, I asked - "How is our balance of participation?" The Vice-president quickly pointed out that the new manager wasn't participating.
I allowed the team to resume at this point and the pattern continued. I waited another 20 minutes before checking in again. This time I asked the same question – "How is the balance of participation?" Again the Vice-President pointed out the non-participant. This time I asked the Vice-President – "How could you draw them into the conversation?" After a bit of reflection, he said – "I could ask him a question". I had forgotten I could ask questions and was focused on answering their questions. I finished the intervention with "Why is it important that we here from everyone on the team?" The responses ranged from the need for diversity to being able to view the problem from different angles.
c) I couldn't figure out how to handle this in the moment so I ignored it.

3.2.2. Upon reflection - how could you have better addressed them?

a, b & d) Upon reflection, I would have done the intervention I did an hour in much earlier. The realization that questions could be directed to everyone by anyone was pivotal in the problem definition. It was when this new manager was drawn into the conversation that the team discovered the origins of the problem.
I would also address the behavior of answering much more than the question that was asked. This could be done with quick interventions either to the person asking the question – "Did you intend that to be a closed question?" If yes, keep the responder to a closed answer. If no, "Would you like to rephrase that as an open question?" – or to the person responding – "What question are you answering?" and have them reiterate the question they were asked, and confirm with the person asking the question if that was what they had asked. Alternately,

during an intervention, I might ask – "How are we doing JUST answering the questions we've been asked?" …. "Why is it important that we confine our answers to the questions we've been asked?" … "How can we find out if our teammates would like the additional information?" … "How will we as a team hold each other accountable for just answering the question asked?" c) I would ask the participants before starting the session how they felt about being there. Assuming the discontent was expressed, I would ask them to trust the process for a couple hours, at the end of the day we could compare it to other process they've used if they would like.

4. Reflections about your team (Team Learnings):

4.1. Leadership skills

Each of the members demonstrated the skill they had identified at the beginning of the session. Several didn't believe they had done their skill, but for each person someone else from the team had an example of observing the skill. I had my list of examples, but didn't need to refer to it since the team had been able to identify the skills being practiced.

4.2. Individual learnings

The individual learnings were similar to my own, from the first time I experienced Action Learning:
- Determine the real problem before implementing a solution
- Use the power of questions (Particularly, ask for the information I want vs. being vague)
- Use questions to draw others into the conversation
- Do process checks in meetings. Never assume because it works for me it works for everyone - deliberately checking with the team to be sure it is good for everyone.

4.3. Team learnings

Here again the team learnings reflected many of the learnings from my first experience.
- The importance of really listening to a response before responding
- The importance of including everyone in the conversation
- That frequently we behave in a way that we believe is good for the team without checking in with our team mates. Critical, to check without assuming.

4.4. Organizational learnings

The organizational learning reflected the team learnings. The members of the team were excited that the skills that they learned in the Action Learning session were easily transferable. From the problem itself the team (particularly, the Vice-President) learned the value of communicating. The simple act of including (or nor including) in decisions that impact their lives critically impact how the feel about showing up for work on a daily basis.

5. Reflections (Personal Learnings)

5.1 What did you learn about yourself as a coach?

I've learned I need to be assertive as a coach. I set the tone in an Action Learning session. When I started treating everyone as equals on the team – the team responded accordingly. It's tremendously important that I set this tone early. As the Action Learning Coach I am responsible to the entire team.

It's tough to balance all the pieces of an Action Learning that I need to do – keep time, observe the leadership skills, observe what is not said as well as what is said and respond to it accordingly.

I anticipate that being an Action Learning Coach will be a continuous journey that I've only just begun. I expect every session I do will lead to another set of learnings. This journey is about progress – not perfection.

5.2 What did you learn about the power of Action Learning?

The process works. Even with my novice approach to Action Learning, the team was able to uncover the real problem, as well as identify a much more systemic problem. They were able to identify solutions to set them on the path to curing the greater challenge that existed at the plant.