

AN EXAMPLE OF VIRTUAL ACTION LEARNING: THE LEVINSON DISCOURSES

Until six years ago, for many years, the late, great Harry Levinson donated 90 minutes a month for six months every year to coach and advise six Division 13 psychologists who were in the early phases of their development as consulting psychologists. Harry worked virtually, using conventional conference calling technology. He felt an obligation to provide new generations of consulting psychologists with a sort of internship that was not generally available at that time for psychologists that were converting from clinical, counseling, or I/O to consulting psychology.

Harry's health was declining. He no longer had the energy to continue. I was one of Harry's protégés and was offered the honor to continue what I chose to call the *Harry Levinson Discourses*. So, five years ago, with the extremely competent assistance of the first of three enthusiastic volunteer Division 13 members, Natalie Baumgartner (followed by Beryle Wingate and, now, Michelle Downey), we offered the first season of Harry's legacy program. These volunteer project managers advertised the free event, screened the applicants, and managed the logistics of the conference calls. I developed the PowerPoint slides that we used to guide participants through the process and served as team coach. We limited the number of participants to six because of time constraints. However, on occasion, several lurkers found their way into our monthly conference calls.



We followed Harry's structure:

- Six 90-minute sessions
- Each session devoted to one participant's consulting problem
- Review of results of the previous month's presenter's actions
- Brief description of consulting problem by the month's presenter
- Inquiry plus recommendations by participants to the problem presenter
- Summary and discussion, including analysis, by Harry

To some extent, I was prepared to relieve Harry because I knew him, his theories, and his practice model very well. Also, had a little experience with virtual Action Learning teams. Skip Leonard and I conducted a webinar on Action Learning (Team) Coaching with experienced Division 13 members prior to this. Skip and I learned a few important things from our colleagues. Skip observed that vetting the problem is extremely important. It should be current, complex, cut across organizational boundaries, and involve the presenter. (We had some difficulty when a presenter presented a clinical psychotherapy case study.) I observed that our participants responded to the problem presenter's description of her consulting problem by either

presenting an analysis or offering a solution – before describing and understanding the problem, its etiology, its context, or the desired state.

Skip and I asked team members what they were trying to accomplish by asking close-ended questions (yes/no or multiple choice) and then stating their analysis or proposed solution. They said they were trying to elicit more information from the problem presenter so as to better understand the problem and then resolve it. Further discussion revealed that, rather than eliciting pertinent information from the problem presenter, those who offered analyses were testing their personal theories based on selected elements of the presenter's initial comments. Those who offered solutions were action-oriented and sought to quickly find or create and offer simple (and simplistic) solutions to complex problems. Further, neither team members nor



the problem presenter asked questions of the other team members; all questions were directed to the presenter; all presenters' answers were directed to the team member that asked the question. Team members did not build on each other's train of thought; each operated as if their assumptions, theories, and values were the only ones that mattered – time spent on other's questions was treated as if it was wasted on digressions. It was as if team members were competing with one another over who inferred the "right" diagnosis or solution.

I intervened, saying something like, "What is your purpose in asking a yes/no or multiple choice question?" "How would you phrase that question in an open-ended fashion?" Subsequently, several team members experimented with the open-ended style of asking questions, expressing surprise that these were far more effective in eliciting what the responder thought rather than playing guessing games with their own theories and opinions. However, one team member – a very experienced senior member of Division 13 – protested, in essence saying, "Interpreting and advising are at the core of my long years of successful practice." She would not experiment with the open-ended method of asking questions.

That first effort in applying Action Learning in a virtual team context yielded enough lessons learned to encourage me to take on the responsibility of coaching the Levinson Discourses. So, upon accepting the role of coach for entry-level consulting psychologists, I decided to use the Action Learning approach to team consultation (See Marquardt et al, 2009; Freedman & Leonard, 2013).

The first lesson that I enacted was to intervene quickly and concisely whenever a team member began to ask a closed-ended question. So, for example someone started to ask a question prefaced by, "Is it possible that ...?" or "Was this symptom caused by (this) or (that)?" As the coach, I intervene immediately, even before the person finished the question to help the person craft a more appropriate open-ended

question – until the team was ready to identify probable solutions.

The second lesson was to have each problem presenter write a one-page summary of the consulting case to be presented. I reviewed each proposed case to assure it was current, complex, systemic, important, and involved the presenter. The problems for which the presenters wanted help from the team was either how to fix something that was broken, how to capitalize on a new opportunity, or how to manage a recurring, unsolvable dilemma. The approved case was then distributed to all team members.

The third lesson involved educating team members about Action Learning. So, two weeks before the first scheduled session, coach delivers a one-hour webinar on the theory and methods of Action Learning and emails a copy of Marquardt's (2004) paper to each team member.

For the Action Learning team sessions themselves, I used an 80-minute version of the opening session script that Marquardt, Leonard, and I developed for WIAL.

At 80 minutes, coach introduced comments and closure.

- Q&A
- Coach's comments (analysis, assessment)
- Next month's problem presenter

We have no formal evaluation of the efficacy of this virtual Action Learning application. However, at our annual mid-winter conference in San Diego a few weeks ago, about 12 current and former team members introduced themselves to me and thanked me, rather profusely, for having provided them with this professional development experience. This was extremely gratifying.

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References

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