CERTIFICATION FOR ACTION LEARNING COACH PROJECT
(Sample Paper)

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- *CALC2 date and lead: Mar 2019/ Mike Marquardt*

  or … 5-day CALC intensive: Mar 2019 / Mike Marquardt

1. Introducing Action Learning

1.1 Introducing Action Learning to the organization:

After I had completed the CALC program, I was quite eager to do my first practice sessions as soon as possible. I contacted a friend who owns a small company and explained I had a new interesting team process that I wanted to share with him and his team. He agreed and 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. The company had just finished developing a leadership skill framework but besides training and annual assessment they didn't really know how to put this in action … 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 observers. 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 overall lead 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 by the process. And each of the coaches expressed the challenges of coaching. Several of the higher ranking participants recognized the power of the process and 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 to run Action Learning sessions within their departments. The company owner agreed to run Action

Learning sessions in one department. After conferring with each department head 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 and several were eager to participate in the session. 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. We also ran a small exercise around types of questions, powerful questions and active listening.

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 and demo session 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 practice asking questions and learn while experiencing the process.

1.2.1. Process

In the first session, I followed the script quite closely. 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 adjusted the script by first asking a check in and asking what each of them had done since the last session.

1.2.2. Leadership Skills

The company had an existing leadership skills framework so we used that one with some small modifications. Before the first session, I spent a significant amount of time explaining that we were not only here to solve a problem but also to learn and develop individually as leaders. I gave some examples of how each leadership skill from the company framework could be demonstrated in an Action Learning session. There were a lot of questions and even a bit of pushback but in the end the leadership skills were well integrated in the session.

2. Action Learning project(s) Description

The project consisted of 2 sessions, conducted offsite to insure the participants weren't tempted to attend to their everyday tasks. The first session was conducted on 23 April afternoon and the second session one week later on 30 April. Both sessions lasted 3 hours. The first session reached clear solutions and insight into the real underlying problem. The second session started to look at the larger problem that the first session 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.

Sesssion 1: 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. He realized that this was not a scheduling issue but a motivation issue.
Session 2: The team started to explore what additional communications avenues needed to be addressed to increase morale and involvement from the workers.

2.4. Actions to be taken

Session 1: The team identified three potential solutions that were acceptable to both management and the workers and sent these back to the teams to vote on. This one step towards inclusive communication had a very positive impact and workers expressed their appreciation being heard.
Session 2: The team identified more options to improve communication in general and positively impact the culture. These options were around involving the workers in getting their inputs on organizational issues that impacted them.

3. Learnings

3.1. Challenges encountered completing the project

I was quite concerned that not all identified members would show up for the session, or would disappear because of some urgent business in the middle of the session. The second issue was around the selection of the participants.

3.1.1. How did you address them?

I communicated to the team that this was not a regular meeting, but a team working sessions, and that participation of all to the whole session was necessary. As described above, we made a random selection and this seemed the most fair way to proceed. And although all agreed to

select participants in this way, some of those who were not selected made it clear they were disappointed.

3.1.2. Upon reflection - how could you have better addressed them?
This worked very well. In fact, all team members were really interested and focused and participated the entire session. So my communication to them apparently worked. Not sure how I could have better dealt with the selection process to avoid disappointment.

3.2. Intervention opportunities
Session 1

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) 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.
c) There were a lot of closed questions and many of these were leading questions that in fact had a proposed solution embedded in them

Session 2

a) Although all team members were eager and motivated during the first session, one came to the second session clearly distracted and from her body language I know she was not really happy to be part of the session
b) The balance of participation was much better in the second session, but quite some team members forgot about the first ground rule and just shared their opinions about how to improve communication in the organization

3.2.1. How did you address them?
Session 1

a, b) 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 was not really expecting this and didn't continue my intervention.
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 intervened by asking the team members "How is the quality of our questions ?" and some said OK and others said that the questions were average. Nobody commented about the closed

questions or the leading questions so I just said "How can we ask better questions ?" but the team didn't really get the meaning of my intervention.

Session 2

a) I didn't really know how to deal with this so I ignored her body language …

b) I realized from the first session that I should not wait to intervene so that an issue did not become an obstacle. So as soon as I heard someone making a statement, I asked "Do you have a question ?". I tried to alternate a bit when others did the same, asking "What question are you answering ?" or "Can you turn that into a question ?".

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

Session 1:

a, b) 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 should also have changed my first question ("How is our balance of participation ?") because I asked it twice and I got the same response from the Vice President. I would also ensure that if I ask the question about participation, I show with my body langague that I want to hear from each team member, probably NOT starting with the Vice President.

Instead of focusing on the questions, I really would need to find a way to focus on the fact that the Vice President is answering in a very long-winded way. I could ask "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. And if the question was a closed question, I would make sure the responder answers accordingly. I also 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) My question should have been more focused. If I wanted to help the team learn about closed versus open-ended questions, I could have asked "For the last 10 minutes, are we asking more open-ended questions or more closed questions ? What is the impact if we ask closed questions ?". On the other hand, if I wanted to focus on the leading questions that had solutions embedded in them, I should have asked "Are we asking questions that are trying to understand the problem or more questions that are proposing potential solutions ? What would happen if we try to evaluate solutions before we have a common understanding of the problem we are trying to solve ?". By asking a more specific question, I would better help the team with their learning and improvement.

Session 2:

a) I should have done something because I was aware of her low level of energy and I became aware others in the team were noticing the same. I could have asked something like "Team, how are we all doing working together in our second session ? On a scale of 1 to 10, please rate your own level of energy and motivation ?" Hopefully, this would have given the opportunity

for the low energy person to highlight her lower rating and this could have lead to a discussion that could reveal maybe what she was struggling with. I then could have asked the team "How can we best support one another if someone has other chalelgnes or concerns that pull their focus away ?" This could have been an open and meaningful exchange for the team.

b) Although each time I intervened, the participant changed the statement into a question, I felt that I had to make the same intervention many times. I should have taken a bit more time and invite the team to reflect … "I am hearing quite a lot of statements in our session. Do you hear the same ? What is the impact of not asking questions ? Why do we have the first ground rule in action learning ?". I should have taken the opportunity to invite the team to reflect on why we ask questions and what the power of questions is, instead of just repeating my same intervention.

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, because I reminded them a few times. Several didn't believe they had used the skill they had selected, but for each person someone else from the team had an example of observing the skill during the session. I had my list of examples ready for each team member, and I shared a few examples that I thought were meaningful for the concerned members.

In the second session, the leadership skills became very natural to the team members and each of them were eager to select and use their chosen skill during the session. At the end of the session, there was meaningful peer feedback and as a coach I did not have to add my own comments. They also shared that it was refreshing to integrate the skills from the company's leadership framework in this kind of working session, because the leadership skills often remained a theoretical tool that most struggles to put into practice.

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
- Writing down what each thinks the real problem is can be an eye-opening experience
- 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
- It's a good idea to get others' help and feedback when we try to apply new leadership skills
- 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. They all shared that they were eager to try and ask more questions to their respective teams in their department and to apply the learning about the leadership skills with their subordinates and peers outside of the session.

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 and this is a bit against my nature. I realize that as Action Learning coach it is up to me to set the tone in the session. In the first session, I wasn too hesitant to deal with the Vice President talking too much, but I realized that not addressing this negatively impacted the team. 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.

I also learned that my interventions need to be short and sharp. The first question of the intervention is the most important, where the coach will invite the team to focus on learning and to be aware of what is going well or not well in the current session. My interventions in the second session were smoother and the team reacted positively.

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, following the process and respond to it accordingly. By biggest challenge for future sessions will be really active listening, making sure that team members are answering the questions but not expanding beyond the question.

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. As a whole, despite the strong personality of the Vice President, the Action Learning process was a powerful working session for this team. They got more done and everybody participated positively than happens in their normal meetings. And the learning mindset has impacts beyond the session as well, when team members commit to apply and try out what they learned in the session with their respective teams. Action Learning clearly brings a benefit that has a multiplier effect.

6. Testimonials (Optional)

6.1. Team members

Some interesting remarks from the team members during the learning debrief:

"I realize that I only ask closed questions. The power of open-ended questions really opened my eyes and I can't wait to try out with my team."

"We should apply the principles of Action Learning to our weekly meetings. That would ensure everybody is engaged all the time instead of working on their computer during the meeting."

"Really appreciated the role of the coach. There were few interventions, but these were really powerful and helped us stay focused and improve."

6.2. Client / sponsor / Organization

"Action Learning is really a great way to look for the root of the problem. The engagement of all team members is extraordinary. We really need to find a way to modify the way we work so that Action Learning is at the heart of things !"

7. WIAL TALK (5 scenarios and responses copied from the blog)

7.1. Scenario 1

Scenario: Agreement

WRITTEN BY DRBEA ON APRIL 8, 2019. POSTED IN WIAL TALK

As an action learning coach, how would you handle the following situation: The team seems to be at consensus but continues to question the nature of the real problem.

Tags: Action Leaning, Action Learning Coach, WIAL, WIAL Action Learning, WIAL Talk

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As an Action Learning coach I perceive in this situation a propitious moment to bring more awareness to the group, then I will bring this situation to the group in the form of an observation, something like: "I realized that you had already reached consensus on the real problem but now they are questioning, how do you want to deal with it?

↩ Reply

7.2. Scenario 2

Scenario: Missing Actions

WRITTEN BY DRBEA ON FEBRUARY 18, 2019. POSTED IN WIAL TALK

As an action learning coach, how would you handle the following situation: A participant shows up for a session and has not completed the promised action.

Tags: Action Leaning, Action Learning Coach, WIAL, WIAL Action Learning, WIAL Talk

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I would ask the group – I notice that xx has not been able to complete the action they agreed to in the last session – What is the impact? and then How would the group like to deal with that?

↩ Reply

7.3. Scenario 3

Scenario: Coffee Break

WRITTEN BY **DRBEA** ON AUGUST 13, 2018. POSTED IN **ACTION LEARNING**, **WIAL ACTION LEARNING**, **WIAL TALK**

As an action learning coach, how would you handle the following situation:

A participant gets up from the group to fill a cup of coffee.

Tags: Action Leaning, Action Learning Coach, WIAL, WIAL Action Learning, WIAL Talk

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If leaving the group for a cup of coffee or bathroom break is within the group norms that were established, as a Coach I wouldn't say or do anything. If norms had not yet been established, I would take a moment to ask the group how they feel about someone leaving the group for coffee, the restroom, etc. and engage them in a learning opportunity.

↩ Reply

7.4. Scenario 4

Scenario: PP Question

WRITTEN BY **DRBEA** ON APRIL 16, 2018. POSTED IN **ACTION LEARNING**, **WIAL ACTION LEARNING**, **WIAL TALK**

As an action learning coach, how would you handle the following situation:

The problem presenter asks a question.

Tags: Action Leaning, Action Learning Coach, WIAL, WIAL Action Learning, WIAL Talk

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A problem presenter should feel comfortable and free to ask questions to the group at any point. And as an action learning coach I wouldn't have to do anything at this time.

↩ Reply

7.5. Scenario 5

Scenario: Silent Observer

WRITTEN BY **DRBEA** ON NOVEMBER 13, 2017. POSTED IN **ACTION LEARNING**, **WIAL TALK**

As an action learning coach, how would you handle the following situation:

A member if the team decides they know the problem and the solution, so they will sit quietly until everyone else figures it out.

Tags: Action Leaning, Action Learning, Action Learning Coach, WIAL, WIAL Action Learning, WIAL Talk

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I would intervene by asking the group, "How do we feel about the balance of people asking the questions in this session so far?" Whether the answer is positive or negative, my follow up question would be, "What is the impact on the progress toward finding a solution when we have equal participation by all group members?" After listening to any answers, I would then ask, "Would anyone that hasn't had a chance to ask a question like to contribute now?"

↩ Reply