

Action Learning in Retail

In the fall of 2005 I participated in the Learning Styles course called “Understanding and Working with Learning Styles.” I found it to be a real eye opener for me as I was looking for a new approach to my work and to develop a teaching style to suit any type of learners in many situations, particularly in the workplace. I work with many well-educated young people from 18 years of age to mid 30’s with the average being around 26. Many of these folks are enrolled in learning institutions working toward first or second degrees and are of a generation that views the world a little differently than those of my own generation. Consequently I wanted to learn how to adapt my style to be much more effective in my role as a manager and leader in what I wish to create as part of a learning organization. A learning organization is defined by Peter M. Senge in his book *The Fifth Discipline* as ‘an organization that is continually expanding its capacity to create its future.’ Now that I understand the fundamentals of learning styles, the next step was to put that knowledge to work in a process of Action Learning, the ‘practice of learning in real time’ (Herasymowych). I am writing this paper as the assignment for the Action learning course to document an actual situation which utilized the Action Learning process.

Action Learning is defined as “an approach to dealing with complexity. It is a way of thinking and acting that enables us to solve real problems in real time and to create the resilience required to deal with complexity and change.” Reg Revans, who developed action learning, believed ‘that everyone in an organization has ideas to contribute. If you can gain access to these ideas, you can tap into the unused potential in an organization.’ He developed action learning as ‘a way to educate managers to deal effectively with organizational change.’ I had a problem with how to successfully implement a new role for my front line staff called Product Specialist and as previous experience showed: changing people’s roles is not always easy. Shortly, I will describe how I used the Action learning system to begin the implementation of the change for a group of staff independent of the learning styles of any of the participants.

There are four learning styles associated with the learning cycle. Determined for individuals by a questionnaire, those four styles are categorized as learning orientations in the reflective (gathering data on an action and analyzing it), theoretical (trying to make

sense of the data, looking for patterns, drawing conclusions), practical (planning the next steps in a logical manner) and active (when one takes action on the plan). Reflective and Theoretical orientations are considered the reflection stages of the cycle, and Practical and Active are considered the action stages. As people learn, they naturally perform this reflective analysis and then take action, then again reflect on those actions before deciding the next action steps. This continuum of action and reflection, action and reflection becomes the Learning Cycle. The four learning orientations were placed in a learning cycle model developed by David Kolb, Peter Honey, Alan Mumford and Bernice McCarthy. They described the learning cycle as a 'set of steps that you go through when you are solving a problem.' It underlies the action learning system because it offers actions and opportunities for reflection within each learning orientation.

Another element in the process is giving people an environment for 'critical thinking' which is a 'high level thinking skill that is practiced by people at every level in learning organizations.' Critical thinking requires you to use reflection to get the facts and collect information, use questioning techniques to test assumptions for accuracy or validity, and determine alternatives. Critical thinking is linked to the learning cycle by following the same cycle of action and reflection to encourage learning and decision-making. 'To make better decisions, you must build in time to reflect critically' (Herasymowych). Even in our time pressured work environments we almost need to slow down to move forward more quickly. The Action Learning process is designed to slow people down and encourage critical thinking. This may seem frustrating to some types of learning orientations. For example the active learning orientation may want to rush to action or the reflective learning orientation may take more time to reflect. Here lies the opportunity for learning. Learning happens when people are 'stretched into non-preferred learning orientations'.

I selected a problem at work that required a process for implementation and chose to utilize the action learning system. This system, which includes all four learning orientations or stages, allows for any type of learner in a situation to participate in a process where each participant feels they have an opportunity to contribute. There are eight elements of the Action Learning System: (2 actions within each of the four learning styles, or stages):

Reflective:

- A. Gathering data
- B. Questioning assumptions

Theoretical:

- C. Generating a summary statement
- D. Generating ideas

Practical:

- E. Testing ideas
- F. Making a decision

Active:

- G. Taking action
- H. Telling the story

My actual situation from work involved gathering together approximately 20 front line staff and 3 team leaders from our store (a retail consumer co-op) for a meeting to launch the implementation of a new role called Product Specialist for front line staff (the Product Specialist role involves 3 activities: communications, merchandising and a community resource aspect). Based on the two rounds of Action Learning in the course, and with the help of 3 class- mates from the Action Learning course, we designed a plan to incorporate elements of the action learning process. I took on the role of the situation owner, and helped my team leaders facilitate the staff through the process we planned.

In the staff meeting, I presented the idea to the group, describing thoughts, ideas and the success of this program in our Ottawa store (this was the group GATHERING DATA). We also connected the value we saw in this new role to what our staff were asking for in our staff engagement surveys. As well, as we saw a distinct advantage to encouraging our staff to develop, learn, have more time with their team leaders and to feel valued for their knowledge. We gave each participant a handout with the detailed role description.

Next, we broke the staff into groups of 2. Their task was to take 10 minutes to discuss between them and come up with their top 2 questions regarding this new role (TELLING THE STORY). The groups of two were then facilitated to describe their top 2

questions while we recorded them all on a flipchart. (we were GATHERING DATA) As we recorded the questions we were able to clarify our understanding of the questions and I saw this as the staff were continuing to Telling their Story. What was really interesting was that of the 38 questions we recorded, approximately 1/3 were clarifying questions and the other 2/3 were on implementation. I was excited by this success as the staff were asking very tough questions but were already over into the implementation (TESTING IDEAS) part of the process.

We are now planning another meeting for February 27, 2006 where we will continue the process. We have invited the staff (approximately 12 people) who are interested in building the implementation plan and we will split them into two groups to discuss and record some ideas that could resolve the implementation (GENERATE IDEAS) plus a summary of what they believe the best approach will be and in doing this, answer some of the implementation questions. They will present their summaries to each other for discussion on the advantages or disadvantages. (TEST IDEAS) Then we plan to have the whole group discuss the positive and negative results, including who and what will be needed to make this work. Our work then moves to the DECISION MAKING part of the process. This may require another meeting depending on the clarity we get out of the decision. It may be best to give people a chance to reflect on the decision and be ready for the future action. At this point we will be ready for full implementation. (TAKING ACTION) This will require some further communication and again be telling the story!

As one can see, we followed the action learning process fairly closely and I am happy to say that our staff are feeling quite positive about this and are anxious to proceed with some guidance and much of the next steps are theirs. The outcome of using the action learning principles was a valuable part of resolving the problem of acceptance and implementation: that is what action learning is all about! I feel the alignment with the process was instrumental in the success, although we still have a few steps to go. Any advice I have is when utilizing the process, understand that the different parts allow some flexibility to move into different parts of the cycle. The Action and Reflection parts of the cycle incorporated all four learning orientations. Our learning was a result of allowing some flexibility, providing a formal process for reflection and action allowed our staff to

accept the idea we were presenting. For us using action learning was moving in the right direction. Allowing some flexibility will work to enhance the learning for everyone. To further confirm the success of the action learning principles will be the result of our next steps and evaluation after testing for the next 6 months. My personal learning was that the process works well by involving people and engaging them in meaningful work supporting an initiative that supports our organization. I also learned how flexible it is as you can enhance learning by moving from one area of action to an area of reflection and round the learning cycle for all types of learners and to enhance group learning.

In conclusion, the action learning process provided a framework for us to resolve a problem. It allowed our staff to determine much of the HOW and will continue to engage them, making them feel like they are contributing and feeling a part of an important initiative. The accountability will come later when final implementation details are planned and worked out by the staff. We will run this as a test for the next 6 months and look to this process again to use the principles of action learning and move forward with action learning becoming the foundation. Writing this assignment has given me some new tools in my search to be more effective as an adult educator. I am committed to help my workplace become ‘an organization that is continually expanding its capacity to create its future’ (Senge) by allowing the process and elements of the action learning process to support the learning organization as we move into our future.

Bibliography

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