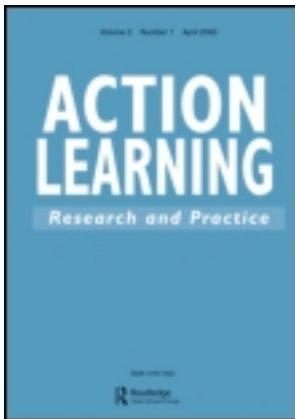


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Integrating action learning in an organisational development process: facilitating members of an 'expert culture' in an industrial organisation in Germany

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ACCOUNT OF PRACTICE

Integrating action learning in an organisational development process: facilitating members of an ‘expert culture’ in an industrial organisation in Germany

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This account of practice will focus the different strategic steps to implement action learning (AL) in an industrial context where managers as *experts* are used to solve problems and not to ask questions. It will look at the experience of an AL facilitator working with a set of young engineers from different working groups who want to improve the cooperation within and between the groups.

Keywords: cross-organisational action learning set; expert culture; industrial context; organisational development; facilitation

Introduction

In this account, I would like to describe my first experience to introduce the ‘ethos’ or ‘philosophy’ (Edmonstone 2011; Hauser 2012; Pedler and Abbott 2013) of action learning (AL) into an industrial organisation. Now I can look back to a period of four months accompanying an AL-set of seven academic employees who work in a typical ‘expert culture’. It was not only a challenge but also an enjoyable experience to assist this group of young people and see them growing personally and professionally.

Process of implementing ‘AL’ into an organisation

Starting the change process with the management team

The organisational development process started in 2010 with the Head of Department and his seven direct reports (group leaders) and continued with ‘transition workshops’ for every group in 2012 (January–June). In July 2011, I gave my first short flip-chart presentation with basic ideas and asked them to work in an AL-set to reflect an actual problem and encouraged them to use the ‘thinking–feeling–willing’ method. This experience had the effect of a ‘door opener’ and in January 2012 one of the group leaders had the idea

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(inspired by his boss) to build an AL-set. At this time, I started an individual coaching process with this group leader and took the opportunity to ‘push’ his activities towards starting an AL-set (choosing the members, coordinating the initiative with the HoD and his colleagues, etc.).

Continuing the change management process with the next management level

The targets of the team-building workshop with the group leaders and their direct reports were:

- (1) Dialogue and feedback between group leader and team members: what are the requirements and behavioural consequences of the new strategy (i.e. new roles and responsibilities)?
- (2) Exchange of mutual expectations between group leader and other team members (differentiate between wishes, expectations and demands).
- (3) Building a ‘shared reality’: How does the cross-organisational cooperation in our department look like?
- (4) What kinds of actions are necessary to improve our efficiency?

These workshops were delivered between January and June 2012 and especially the team members appreciated that they got a better orientation and the opportunity to ask questions and discuss unclear issues. With the enthusiasm of the ‘workshop-spirit’ they went back to their daily business and I got the impression that they had some difficulties to transfer the commitments (‘to do’ lists) of the workshop into real actions.

Coaching the head of department and one of the group leaders

Especially the coaching process of the group leader gave me the opportunity to push forward the ‘kick off’ of a cross-organisational AL-set. The HoD delegated to him the responsibility of initiating this process and my role was to give conceptual support and facilitate the set meetings.

Together with my offer I sent them a conceptual framework with the following structure:

- (1) Task/ Project: How can we improve the cooperation in our newly organised reliability engineering department?
- (2) Expectation of sponsors/targets: concrete measures/actions (minimum three) are defined and realised.
- (3) Organisational issues: seven participants (one representative from every group), review after three months, approx. three to four facilitated sessions.
- (4) What will happen in the AL-set:

- working on problems that are real and relevant to the present situation (work related and action focused),
- tackling no right answer situations and
- personal concern.

Benefits for the organisation and for set members

Set members continue the process of a learning organisation and take over responsibility.

There are also efficiency gains: AL is no ‘add on’ but is dealing with relevant ‘wicked’ problems of the organisation. There is evidence of co-operation, joint working and mutual support, and partnership thinking is essential in all of this. There is an exchange of knowledge, experience and ideas and the whole process is work related and action focused. For the set members, the benefits include a good balance of support and challenge in the AL-sets. Members develop a better understanding of group processes and efficient team work and they learn on three levels: about the problems in their organisational context, about their own personality and about the process (i.e. what kind of effects do we observe? How do our colleagues react?).

Process of facilitating an AL-set of seven members (one member of every group) from July to November 2012 (four half-day sessions)

The first set meeting in July was opened by the group leader (sponsor) who introduced shortly the ‘task’ for the next three months. In his presentation, he referred to my conceptual framework (see 1–6). After 15 minutes I started the facilitation process:

- Every member (three women, four men, all with an academic background, engineers, physicists, mathematicians, representing the two locations of the department, age between 25 and 35) presented themselves on a flip chart (name, function, my contribution, my expectation, something personal).
- Input: what is AL, three types of problems (Grint 2008), ‘wicked problems’ demand shared leadership.
- Group-work: Set members defined their rules and roles.
- Individual work: every member filled in the ‘AL problem sheet’ (Hauser 2012).
- I introduced the five-step method.
- I gave the hand-out ‘Nine Steps to let AL fail’.
- They filled in the set review sheet.

Especially in ‘expert cultures’ people are not used to talking about their problems, fears or inconveniences. So I gave them space and time to talk about their special situation, to listen to each other and gradually develop some

trust. One (male) member talked about his fears and one (female) member reacted spontaneously: ‘How can you bear the situation?’ I gave her feedback and said that I had the impression that she had empathy for the emotional status of her colleagues.

According to their main concern ‘how can we improve the cooperation between the two locations of our department’ the set decided to change the meeting location every time.

To start with I asked the set members in the second meeting to give each other a short ‘climate check’:

They put their cross on the chart that I had drawn on the flip chart: ‘support–low–high’ and ‘challenge–low–high’. Four crosses were put in ‘average support but high challenge’, one cross in ‘medium support and low challenge’. One participant was absent and they told me that he was involved in an important task force. I asked them ‘What does this mean to you?’ I had the impression that this happened very often and they normally did not ask any questions concerning the absence of a meeting member. They even did not know anything about the issue of the task force.

I felt that the atmosphere from now on became somehow depressed and I asked everybody what kind of experiences/actions he or she had made in the meantime.

I was surprised that the communication style was very emotional and open and some members mentioned their frustration and fears concerning the perspectives and future of their projects:

We only do troubleshooting – how can I change anything?

I wish we had started earlier with an AL-team – but I do not worry about our international business!

It is sobering – I fight against very traditional and inflexible structures.

We need more orientation – concerning the internationalization – what will happen if we transfer our knowhow to India, Hungary etc.? Will this kill our jobs?

I have talked to my colleagues in my group; I have got the impression that I am the only one who cooperates with the people in SI (other location).

But they also mentioned little success stories:

I visited a colleague with whom I had always some problems and we talked about 2 hours: now my colleague feels more responsible to give me feedback; we have fixed some written commitments.

I got into contact with my boss (group leader) and asked a lot of questions and for the first time he explained his ideas to me.

They listened carefully to each other and realised that they needed (parallel to their actions) a more substantial information and orientation about the strategic direction and future development of the department. They felt that this would be a prerequisite for working successfully in the AL-set and obtaining the targets. So they agreed on the following actions:

- (1) Inviting the HoD to every group (not to present power point charts but preferring a dialogue, answering urgent questions, etc.).
- (2) Visiting the other groups in a kind of rolling system: Target: Exchange of experiences, information and issues, checking if they are useful for the own group practice.
- (3) Concerning task forces: Organising exchange of interesting ‘failure pictures’.

In the third meeting, I got the feedback from the set leader, one of the female engineers, that the AL-team has a positive effect on the organisation. ‘What do you perceive concretely?’ I asked her. She told me that their colleagues in the groups gave a lot of attention to the AL-team and appreciated very much the idea of inviting the HoD to their regular group meeting. The HoD told me that he learned from this ‘action’ that in the past he concentrated too much on individual communication and neglected to be present in the groups.

The set members used this meeting to prepare the first review that will be scheduled end of September. The set leader explained that she often made the experience that she presented carefully prepared charts for a project review, but nobody cared for them after the review. So the set asked: ‘How can we avoid this happening again?’

The set leader encouraged them and said: ‘I have a good feeling, this time we have already realised concrete actions, some are very small steps, but we are proceeding!’ I think that it was helpful for the set that she expressed her ambivalence that others also felt but could not admit honestly to their colleagues.

Another set member talked about her surprise: ‘We can change a lot with little effort! I gave personal feedback to my boss and he enjoyed it!’

The member who missed the two (facilitated) meetings at the end of July and also the meeting in August gave a personal feedback to the group: ‘I feel distant to the group. I have missed two of three meetings. I have to admit that this ‘AL style’ is not my style of working, I have some difficulties!’

I appreciated his openness and gave him a positive feedback. But in reflecting this interaction I realised that I missed the opportunity to ask him: ‘What should happen for you to feel more familiar with AL or the communication in this group?’ The set as a whole made a lot of progress in talking about their personal concerns, listening to each other and empathy.

The review had been very successful and the set received positive feedback from the management of the department.

They presented the actions that they had already started in the last meeting in November 2012:

- open discussions with HoD in the regular group meetings (reaction to worries concerning ‘brain drain’: Internationalisation – future of our department).
- Direct (oral) communication: Appreciating the colleague and his/her work

- (i) Principle: Telephone instead of email, visiting instead of telephone talk.
- (ii) Informing the whole department of new employees ('wanted' poster for every newcomer in the Intranet).
- (iii) Less hierarchical habitus, more communication from 'expert to expert'.
- (iv) AL team as a 'Multiplier' within the organisation.
- Know-How/Info exchange:
 - (i) Department-Homepage: Task areas, product teams and competence teams.
 - (ii) Department workspace in the Intranet: installation of information that is interesting for other groups, i.e. concerning task forces (a kind of cross-organisational platform).

The AL-set met two times without a facilitator (in August and October). I appreciated this very much, because they were already able to make progress in tackling their problems independently.

Résumé and reflection: evaluating feedback

I got feedback from different sites:

* the set leader:

The most important thing for me was to learn that even small steps have some effects on the organization. In the past we often were restricted to planning and presenting colourful charts but the AL team started from the beginning with actions-target-orientated and efficient.

Concerning your facilitation:

I was not familiar with AL, I was sceptical, I realized that you gave us our head (kept us on a long rein) and I asked myself why you were not more directive. But then I discovered that the dynamic of our group changed and that we developed more initiative, energy and move to action with this kind of facilitation: we felt responsible for the changes and small steps we intended to push forward.

I do not like to talk about my feelings and when you asked these emotional questions I always felt unease. But I know it is important.

It was not easy for me as a facilitator to find the right balance between *giving and demanding* and *supporting and confronting*. I remember several situations when setmembers seemed to be stuck in the discussion of an issue and I felt very uneasy. I worried if they would leave the set meeting without a satisfying result and that I would be responsible for this. But I learnt from this experience that the set needs my retention to develop its own ideas, concepts or solutions.

- from the sponsor:

The set members are a kind of ambassadors for their groups, but on the other hand their colleagues ask themselves: ‘what are these people in the AL set doing?’

I learn from this comment that the AL-set has to communicate clearly its tasks and targets to the other people in the organisation. Otherwise they will be regarded as a kind of elite circle. I think it is important to emphasise on transparency from the beginning and to inspire them to build up more AL-sets. The experienced set members can transfer their know-how to other colleagues.

- from the set members:

I got a lot of positive feedback like ‘we are more curious to put ideas into action’, we accept more different beliefs, attitudes and perspectives, we inspire each other, we are more proactive in communicating with our partners in other groups or departments;

But we also have to be careful: other departments ‘misuse’ the AL-team as a ‘problem-solving team’ that can tackle all the problems that come up in an organisation; or they use our AL-team results as proof that we have already done something to solve the critical issues that came up with the Annual employee satisfaction survey.

Conclusion and the future

In May 2011, I started a Certificate Programme, *AL Facilitation* (a cooperation between Institute of Leadership & Management and Bernhard Hauser Consulting) in Munich. After the introduction workshop I felt encouraged to integrate AL in the organisational development process that I had already begun in 2010.

I learned that an AL-team can have a strong influence on the culture and communication style of an organisation. But to avoid the described misuse or attributions of ‘exclusiveness’, I would prefer to implement AL from the beginning of an organisational change process. So if I could go back to 2010 and start the ‘High-Performance Team’ development again, I would give the client a conceptual framework with the following elements:

- Targets of the programme (i.e. develop from ‘individual fighting’ to ‘shared leadership’)
- Principles of the programme:
 - (i) participants take responsibility for their progress and learning,
 - (ii) consequent monitoring of results and progress,
 - (iii) AL: concrete action and reflection after every meeting/workshop (concrete improvements in their daily business),

- (iv) development of the personality of the participants (peer feedback and individual coaching) and
- (v) integration of the next hierarchical level (above HoD).

So in every meeting/workshop you would find a combination of different methods: working in one or two AL-sets, interactive learning (like in a ‘reflecting team’), only short theoretical inputs and individual coaching.

I think that the most important change in this approach would be that the group leaders would from the beginning feel more involved and would take more responsibility for the development process. The time in between the workshops would be also used for set meetings where they discuss their problems, reflect their leadership role and agree to concrete actions.

What I learned from this process personally is that my performance orientation is very strong and so I have to be careful not to bring too much pressure to a group to ‘produce results’. My strength is to offer the set members a certain structure and to let them feel my enthusiasm that AL will bring them forward and that they can trust on their ability to reflect seriously, to get into concrete action and to give mutual support.

Notes on contributor

Sabine Wegner-Kirchhoff is an organisational psychologist, mediator and coach in Germany. Her area of interest is how the link between action learning and leadership development can be realised and what kind of resistance and barriers has the facilitator to overcome.

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