A large communications company wants to find an effective way to enter new international markets. In the past, this problem probably would have been given to subject matter experts to solve. Instead, the company has several of its high-level executives form action-reflection learning teams to find a solution. • A business unit of another large communications company is shifting its culture toward that of a quality-focused, team-based, matrix-managed organization. The move requires a total culture change. Action-reflection learning is introduced as the basis for effecting the change. • A large ferry company in Europe wants to become an entertainment and transportation enterprise. A rigid hierarchical culture and union influence are hampering this goal. The company institutes three action-reflection learning programs that involve top managers across all operating functions. As a result, the culture begins to evolve, which paves the way for new strategies to help the company achieve its goal. • In many organizations today, demands for continuous improvement require that employees learn from their daily experiences in the workplace and apply that learning to anticipate problems before they happen. Just-in-time training, teleconferencing, and training line managers to be trainers are acceptable solutions, but they don't always go far enough.

IT INVOLVES LEARNING BY DOING, BUT IT'S NOT A SIMULATION. SO WHAT IS ACTION-REFLECTION LEARNING? IT'S "TRAINING" THAT TAKES THE FORM OF AN ACTUAL BUSINESS PROBLEM FOR TEAMS OF LEARNERS TO SOLVE TOGETHER.

Action-Reflection Learning

By Victoria J. Marsick,
Lars Cederholm,
Ernie Turner, and
Tony Pearson

Action-reflection learning or ARL is a learning-by-doing alternative to expert-based training. ARL aims to solve real business problems under actual work conditions.

ARL defined

At times, participants in an ARL program look as if they're just doing their jobs. At other times, it looks as if they're being trained in a conventional way. But in an ARL program, the "training" becomes a project in which learning takes place while participants try to solve a work-related problem. The ARL process is always conducted in teams.

The basic characteristics of an ARL program are
▶ working in small groups to solve problems
▶ learning how to learn and think critically
▶ building skills to meet the training needs that emerge during a project
▶ developing a participant's own theory of management, leadership, or employee empowerment—a theory that is tested against real-world experiences as well as established tenets.

ARL isn't a packaged program of predetermined methods and ideas. ARL activities revolve around actual

work include the following:
▶ We increase our learning when we reflect on what we did in training.
▶ By relying on experts, we may become immobilized and not seek our own solutions.
▶ We are most challenged when we work on unfamiliar problems in unfamiliar settings.
▶ Nonhierarchical teams from across organizational departments and functions enhance learning through new perspectives.
▶ Facilitators can accelerate learning by helping people think critically.
▶ Learning should accommodate and challenge different learning-style preferences.
▶ Whether in individual and group learning, we should examine the organizational system as a whole.

There are many variations in ARL programs. A program can involve the entire organization or only part of it. In the latter case, the results may filter through the organization and become catalysts for organization-wide change and development. An ARL program also can be a partnership of several organizations, with participants from each one.

Public and private organizations have conducted ARL programs—

People outside the program may play roles as "owners" of a problem or resources for its resolution. And because the problems studied in the projects tend to come from or to affect their jobs, line managers take on roles as decision makers.

Step 1. The first step in planning is to ensure that line managers understand how ARL works, that they're involved in decision making, and that they create a list of potential project problems that are meaningful to participants and their jobs and that are important to the organization as a whole.

The problems should be ones for which employees conceivably could offer several viable solutions, rather than ones that could be better solved by an expert. A typical problem might be finding ways to help senior managers reduce employee work loads in order to improve customer service.

Line managers should determine who "owns" the problem—in other words, who in the organization is most affected by it. Once that is determined, the line managers help select the participants from among the employees who are affected. Participants and their managers may want to draw up contracts so they can plan their schedules to accommodate project work. Then the participants form ARL project teams to work on the problem or problems selected.

Each team is made up of four to six employees who have been chosen with regard to diverse personal characteristics, educational backgrounds, and functional expertise. This diversity enables project teams to examine problems from new and different perspectives. To that end, team members tend not to be experts in the problems being studied. But as teams work on projects, they must identify and access experts and stakeholders in the organization whose involvement is necessary for success.

At first, it may be best not to call the new "training" program "action-reflection learning." When you do, you may spend a lot of time justifying ARL to skeptics.

You might want to follow the example of an HR manager who

AT TIMES, PARTICIPANTS LOOK AS IF
THEY'RE JUST DOING THEIR JOBS

---

problems that have strategic importance for an organization. Throughout an ARL program, participants use the "laboratory" of the project to gain insight into similar problems on their jobs. They get feedback and try out new behaviors. When participants work on workplace problems, they not only learn by doing, but they also come face-to-face with the messy, ambiguous reality that often exists outside the classroom.

British physicist Reg Revans is credited with creating ARL, but the basis for ARL is implicit in the work of many people who have observed that people can learn from their own experiences. Some of the assumptions that have emerged from that

Exxon, MCI, Motorola, Hewlett-Packard, General Electric, General Motors, AT&T, and the United States Army, to name just a few. Many European companies use ARL in management development—including Volvo Truck, IKEA (the Swedish furniture maker), and British Airways.

ARL design and facilitation

An ARL program requires three to six months of planning. When facilitators first need to be trained in ARL, the planning stage may take longer. The design of an ARL program differs from the design of an expert-based training program.

ARL programs focus on actual problems within the organization.

described what she wanted to do in terms of business and management development needs and never used the term, "ARL." Once the program was launched, she provided some reading material about ARL to help participants understand how and why it was different from other training programs.

Step 2. The second planning step is to develop learning activities around each project. This approach is different from the design of expert-based training. You should still do needs assessment in advance to prepare skill-based training segments. But the reference point is always project work and the project problem.

A typical ARL does include one or more icebreakers and some prepared input from specialists on the program's topic. But formal training segments are provided just in time and in a relatively unstructured way.

For example, a project team might hold a meeting in which facilitators observe and give real-time feedback on team interaction. The facilitators then discuss feedback with team members to check out the facilitators' observations. After that, the facilitators hold brief training segments to allow team members to practice giving and receiving feedback, to address meeting management, or to meet training needs that have emerged during the project.

Step 3. This step involves planning informal team meetings and structured sessions that involve all participants. Part of the time in a typical ARL program—which can last for a month or up to six months—is spent in teamwork on the project and in related discussion that takes place in the informal team meetings. Part of the time is spent in the structured sessions, in which the participants address topics that are relevant to the entire group's development—leadership roles, for example.

The makeup of team meetings and structured sessions depends on specific organizational needs.

Step 4. In the final step, each team is assigned a facilitator—preferably someone whom team members don't already know, so that he or she can act independently of the organization's culture.

After the project is completed, the facilitator helps participants reflect on their work, so they can learn more about how they identify, assess, and solve problems. The facilitator also helps team members assess how they think and learn as individuals and as a group. The facilitator's role is to help project participants see how they listen, give feedback, plan and run meetings, work with other people, and identify assumptions that shape their beliefs and actions.

The facilitator is supposed to ask questions that team members might avoid asking. He or she ensures that the primary focus is on learning—not just completing the task. Facilitators record their observations. Periodic discussions between them and team members provide opportunities to reflect on the project, to generate and exchange insight, to give and receive feedback, and to think. The "reflection" in action-reflection learning means thinking about the content of the project and the process by which individuals and teams develop and learn.

The facilitator helps team members continually redefine the stated problem—with input from key organizational players—until it's clear that the team members are asking

ARL Case Studies

Individualized model. Lex Dilworth has developed an individualized ARL model at the Florida Department of Labor and Employment Security to provide career development for minorities and women who have been excluded from advancement. Several positions are being set aside through a "Gateways to Excellence" program. Upon selection, each employee will be given a six-month, action-reflection learning opportunity in the field of his or her choice.

Tailored to individuals, the program's core will be real-world projects. There will be some formal instruction and mentoring, but most learning will occur through interaction with peers. The program will bring diverse people together from different areas in the organization to learn from each other while solving problems.

Academic model. George Washington University's doctoral program for HRD executives is using an academic program that incorporates ARL. The program aims to help participants learn how to integrate work and learning, develop a community of learners, and establish a culture in which current assumptions can be questioned.

Before being accepted into the program, doctoral candidates identify individual sponsors in their organizations who are one or two levels above them and who can determine and support an ARL project around which to build academic work. In addition to taking courses, candidates regularly meet in small groups to discuss the difficulties they face in their projects and to seek other perspectives.

Typical projects include redesigning a budget process, addressing diversity issues, and developing a way to determine the effects of organizational development in a multinational organization.

Stretch assignments. Consultants Cal Wick and Gayle Robinson show executives how to use an ARL approach to help them get the most from a "stretch" assignment, which is a term for a three-day period that executives may spend together at the beginning, middle, and end of a development cycle.

Using an ARL approach, executives spend the first day of a stretch planning to convert their projects into learning experiences for themselves and their organizations. On the second day, they critically reflect on their actions, challenge past assumptions, receive feedback, and create new development plans. On the third day, they again reflect on their actions, examine the ways in which they have changed through their experiences, and plan for stretching others based on those experiences. During all three days, peer support and individual follow-up supplement their development.

themselves the right questions to reach a solution.

For example, a manufacturing company wanted to retain its competitive edge, due to perceived competition from other firms. An ARL team took on the project and determined that the problem had less to do with competing companies than with internal issues.

Another example involves a company that wanted to build a new central logistics plant for warehousing and shipping its product. As ARL team members worked together, they refocused the problem on making the best use of existing warehousing and shipping facilities, and then on developing more efficient product transportation from those existing facilities.

Clearly, it's not enough for a team to analyze a problem from an armchair perspective and then to produce a thick report. Team members must try to uncover the real causes of the problem in order to find acceptable solutions.

For example, managers at a big chain's headquarters asked retailers at its various stores to assume greater responsibility for decision making.

Initially, managers defined the problem as a skill deficiency on the part of the retailers. The ARL team that was assigned to the project experimented with new behaviors—such as having the retailers reduce the number of reports sent to headquarters and having them stock some popular products of competitors. When top managers reacted negatively to these decisions, headquarters had to examine its own role in creating obstacles to decentralization.

HRD/ARL collaboration

Trainers and human resource developers can work with ARL designers in several capacities. They can coordinate with managers, whose work problems will be addressed in a particular project, to help negotiate adjustments to the increased responsibilities and work loads. They can also explain ARL to supervisors whose staff will be participating in a project.

When trainers are involved in an ARL program, some of them may feel a shift from a "training" focus to a "learning" focus. Sometimes, that poses a dilemma. Several trainers at Esso Resources who made that shift felt they had to define new roles for themselves. To set the stage, they changed their titles from "trainers" to "learning consultants." In a similar vein, Johnsonville Foods renamed its training department the "membership development department."

Trainers may act as facilitators for project teams, but their traditional roles may make it difficult for them to ask the hard questions that ARL facilitators often must ask. Also, ARL facilitators allow participants to manage their own learning experiences; that could entail a shift in thinking for some trainers.

ARL facilitators tend not to use conventional teaching skills, so trainers may have to acquire new skills—for timing interventions, asking appropriate questions, communicating in ways participants can understand, and using models to help participants understand certain issues.

There may be times when training needs grow out of project work. These may call for expert-based training courses or a variation of just-in-time training. These needs tend to be organization-oriented and to fill immediate requirements. By pointing them out, ARL programs can help the training department build an agenda that is based on business needs. Training needs that arise from project work tend to get strong internal support. In such cases, the transfer of training may be enhanced and employees may more clearly see the reasons for training.

When and why to use ARL

ARL is appropriate in the following circumstances:

‣ when problems are complex, with no obvious solutions in sight
‣ when managers need to develop a cross-functional overview
‣ when learning is closely tied to cultural change
‣ when the participants need to develop judgment and to think strategically
‣ when participants prefer to learn by doing, while getting work done.

ARL is often used in management and executive development with many types of employees in various private, public, and nonprofit settings. Although ARL programs can be more expensive than shorter activities, they may save more money than they cost, because they can solve bottom-line problems. Also, participants tend to be highly committed to solutions that they themselves develop during projects. In fact, they often begin implementation while still working on a project.

Although ARL focuses on problem solving and has bottom-line benefits, the primary goal is development—personal, organizational, and professional. Interestingly, when development is emphasized over problem solving, the solutions tend to be qualitatively better—perhaps because people feel freer to experiment with new attitudes and behaviors.

ARL resistance

One argument against ARL is that participants initially may feel that it takes too much time. But they tend to change their minds once the program is underway. They start to gain satisfaction from resolving real business issues. They also find that they're learning to delegate and work smarter.

Perhaps the greatest resistance, which people don't always articulate, is a fear of having project team members ask probing questions about the internal functioning of the organization. Because the problems are actual and because people may disagree about them, conflicts can occur. But then, conflict is a natural part of organizational life and can even be used for learning.

Clearly, action-reflection learning is an effective training approach with dual benefits. It not only helps participants learn problem solving skills; it also solves real problems. ∎

The authors are founding members of The Institute for Leadership in International Management. **Victoria Marsick** *is a professor at Columbia University Teachers College, 525 West 120th Street, New York, NY 10027.* **Lars Cederholm** *and* **Ernie Turner** *are partners in Teamwork International.* **Tony Pearson** *is a consultant in HRD and organizational effectiveness at 215 West 88th Street, New York, NY 10024.*