

ACCELERATING GLOBAL GROWTH, INNOVATION AND LEADER DEVELOPMENT THROUGH BUSINESS DRIVEN ACTION LEARNING:

What is it and how is it being used today in global companies?

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Business Driven Action Learning (BDAL) is a results-focused method and set of principles used by organizations and their teams to address actual business and leadership challenges, and to explore new opportunities; while doing so, BDAL also focuses explicitly on the learning as well as the business outcomes from these activities, and both in turn accelerate, enhance and sustain change, longer-term organizational and business performance, and individual leader development.

Introduction

The objectives of this article are to explain Business Driven Action Learning (BDAL)-- the method, its origins and evolution from 1996 to a more holistic and balanced state today, what it actually is, and how it is used by companies throughout the world; secondly, to explain how BDAL is similar to and yet different from other Action Learning approaches; and finally, to clarify several misconceptions about BDAL.

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BDAL is a term and concept that was launched in 1996. It started life primarily in global companies and over the years many organizations have incorporated the method in their management and executive educational programs. BDAL has been and is also implemented in cross-company senior executive consortiums, such as the Global Learning Alliance. BDAL is applicable to all enterprises: small, medium and even start-up companies, in all industries, publicly and privately held, including family-run businesses. Similarly BDAL had been introduced throughout all organizational levels from the Board to the factory floor. It can also involve a company's stakeholders as for example, customers, suppliers, government officials and civic society NGO's. Some aspects of the BDAL method are used in public service education as well. (Kramer and Kelly, 2010, 43) While most BDAL is in the form of management and executive programs, BDAL can also be initiated in almost any context where work takes place. However, unlike Quality Circles and other forms of work-based activities, the crucial element with BDAL is the equally important focus on explicit organizational, team and individual learning.

1. Why Business Driven Action Learning? Origin and Evolution

In May, 1996 a group of about thirty Action Learning practitioners from the international business community met in the Sophia Antipolis Science and Technology Park in southern France at the Theseus Institute to share

experiences. Companies represented included General Electric, Fiat, IBM, Johnson & Johnson, Philips and others. Little did we realize that this meeting would become the foundational gathering of what has become the Global Forum on Executive Development and Business Driven Action Learning, a worldwide community of practice that has met annually ever since.

Those of us from Europe were of the opinion that Action Learning as practiced at the time, in the 1990s, was too much oriented to the “Learning” side and not enough on the “Action” side. We felt it too focused on personal or individual challenges and not enough on the organization’s or business’s issues and challenges. Certainly, we also understood the importance of learning and reflection especially for problem solving and personal development and self-awareness. We were, however, more positive about what Nancy Dixon later called the “Americanized or modified” version of Action Learning that emphasized work on business challenges and results as a process, but which had no direct link to Action Learning’s founder, Reg Revans, either to his ideas or practice. Many of us had tried the “Americanized” approach to great effect in our respective companies. (Dixon, 1997; Boshyk, 2010, 71-74; Boshyk, 2000; Boshyk, 2002)

It is interesting to note that in retrospect our concerns were those first raised by two pioneers of Action Learning in the U.K. almost two decades earlier. David Casey and David Pearce had worked with Revans on the General Electric Company (GEC, and no relation to the US-based General Electric) program started in 1974. Their comments from their seminal book that described the program were perspicacious and are worth quoting in full:

“We emphasize the learning side of action learning because that is what people ask about. But the action side is likely to become even more important in the long run. In the future it could be an outcome more clearly identified and intuitively sought after by managers. Perhaps the business action in action learning is the missing touchstone to management development which has eluded us in Britain for so long. We all know how critical is the support from top management. It could be that action in their business—on their most pressing problems—is the only way that management development will ever penetrate to the hearts and guts of top managers (as distinct from their heads). Action learning provides that way in.” (Casey and Pearce, 1977, xii)

We were concerned, therefore, like Casey and Pearce, with putting the “Action” back into Action Learning, by emphasizing a results-oriented approach that would not only help individual managers but also the business as well. In our view, so much emphasis was being placed on “questioning” and the “learning” that many practitioners of “traditional” Action Learning had lost sight of the fact that Revans was also concerned about “getting things done”, about solving problems with and for people.

In retrospect, we could have also used the term “Results-Oriented Action Learning” to make our point that it was time to return to the fundamentals of Action Learning, and to differentiate our orientation from the general understanding of Action Learning then popular.

At the same time, we were concerned with the fact that the “Americanized version” for its part was usually too focused on the business challenge or organizational challenge or project and not enough time or focus was provided for the “learning” side of Action Learning in management and executive education. Nevertheless, some thoughtful practitioners did make the effort to balance the Action and the Learning in these “Americanized” programs. Academics who wrote about Action Learning in the business community and others who commented on these approaches often did not know about or appreciate this trend and misunderstood what was being done in practice. (Mintzberg, 2004, 227-228; O’Neil and Marsick, 2007, 1-21) As an aside, it is worth emphasizing that when done well, BDAL involves balancing and integrating the two approaches.

In short, and as we can see in Figure 1 below we were hoping to combine the best of traditional U.K.-based Action Learning with the best of U.S.-based Organization and Leadership Development-influenced Action Learning approaches to management and executive education; and hence

align with Revans' belief that there can be no action without learning, and no learning without action. (Revans, 1983,16)



2. What Is Business Driven Action Learning?

BDAL has come a long way since that initial meeting in 1996. The first publication on BDAL was considered and judged by commentators as very similar to the "Americanized or modified version" of Action Learning, as for example in this excerpt, by respected academics:

"...In this approach [BDAL], groups work on projects identified by senior managers and make recommendations for action. This form of action learning is organization-focused and emphasises problem-solving (Boshyk, 1999 [2000], 2002), but there is much less emphasis on the personal development aspects that are of central importance in RCP [Revans' Classical Principles]. This form

has sometimes been described as being more akin to that of the taskforce rather than action learning (Dixon, 1997)...". (Pedler et als, 2005, 62).

There was some truth to this early comment but in reality there was much more going on within the BDAL community of practice than was suggested in this quote that was not yet in published form. Today, however, one can speak of our more holistic understanding of Business Driven Action Learning. And today, BDAL is a more integrated and "balanced", foundationally deeper and more comprehensive Action Learning method that can be defined on a conceptual level as follows:

Business Driven Action Learning (BDAL) is a results-focused method and set of principles used by organizations and their teams to address actual business and leadership challenges, and to explore new opportunities; while doing so, BDAL also focuses explicitly on the learning as well as the business outcomes from these activities, and both in turn accelerate, enhance and sustain change, longer-term organizational and business performance, and individual leader development.

As can be seen from the definition, there are several assumptions that underlie BDAL and we would like to address these below. Throughout our discussion we shall be primarily mentioning BDAL in the context of executive and management education programs, while keeping in mind that BDAL has been and is continuously being applied in other situations as well.

BDAL: Results-Driven

As can be seen from our discussion above, BDAL's rise and spread was very much based on our common understanding that results are important for the organization and for individuals. BDAL programs address both an organizational Business Challenge (BC) as well as an individual participant's Personal Challenge (PC) or challenges. The former involves a group working together to offer practical and implementable recommendations on how to solve a company BC or several Business Challenges, (and in some cases implementing these recommendations themselves). For Personal Challenges, results for individually-based PCs involve clear indications of a change in behaviour and sometimes performance. All those participating in a BDAL program, from administrators to actual participants and their leaders share responsibility for delivering positive results. This creates a common purpose for all, and in Reg Revans' words, a community spirit as "partners in adversity."

BDAL As a Method

Another part of the BDAL definition refers to it as a method. By this we mean that there is an orderly arrangement of ideas and procedures that can be used by an organization and its teams to design and implement a BDAL program or experience. BDAL can be taught to others so that others can do the same, or they can adapt the BDAL model to suit their particular situation.

BDAL: As A Set Of Principles

Traditional Action Learning as articulated and developed by Revans has at its foundation a very pronounced moral philosophy based on the values of truth, justice, equality, community and harmony. We have already discussed this earlier in this volume. With BDAL as well, there are a set of principles, many of which are akin to those espoused by Revans. This similarity has been mentioned by some Action Learning experts. (O’Neil and Marsick, 2007, 9) For BDAL the most important additions or revisions of the traditional Action Learning principles are as follows:

1. This *learning must be faster than the rate of change*, for organizations, teams and individuals, not “equal to or faster than” as mentioned by Revans; (Boshyk 2010, 78)
2. A *learning “roadmap”* is useful, providing more specificity for participants, and this is encapsulated in what we refer to as the *Seven Dimensions of Learning* (see below);
3. Another necessary condition of BDAL is an *“outside-in” or external perspective on the Business and Personal Challenges* (see below);
4. *Adult learners do not have to be “taught” in an interventionist manner*—they quickly learn how to apply relevant guidelines and then do things by themselves; hence, there is no need or place for interventionist roles and techniques such as the “learning coach” (Marquardt et als, 2009, 103-104, 227; Rimanoczy and

Turner, 2008, 75-132); facilitation of adult learning is the more important skill.

All of these principles as well as the ones in traditional Action Learning play a role in the design, implementation and spirit of BDAL management and executive programs.

BDAL: Used By Organizations And Their Teams To Address Actual Business And Leadership Challenges And To Explore New Opportunities

There are several objectives to a BDAL program. One is to clarify and resolve a Business Challenge for the organization. The other is to help individuals better understand themselves and do something about their Personal Challenges (PCs). The latter are issues that are daily dilemmas, problems or seemingly unresolvable matters especially around leadership and management behaviours in situations such as leading without authority, doing more with less, motivating one's subordinates and fellow team members in difficult times to perform better or be more engaged with their clients and their work.

Personal Challenge discussions take place in what traditional Action Learning refers to as "sets". Facilitation is throughout a BDAL program and in the Action Learning "sets" but only when requested by participants and only as required to set the stage.

Business Challenges are issues that are also without a clear and obvious solution. The top leadership of the company is responsible for providing Business Challenges for the BDAL program and to participants. These are almost always in the form of dilemmas that demand clarification, exploration, analysis and ask for recommendations on a way forward. They are usually strategic in nature and bold in scope because these tend to be the nature of issues at board level. They are, of course, the most challenging for maturing managers and experienced executives.

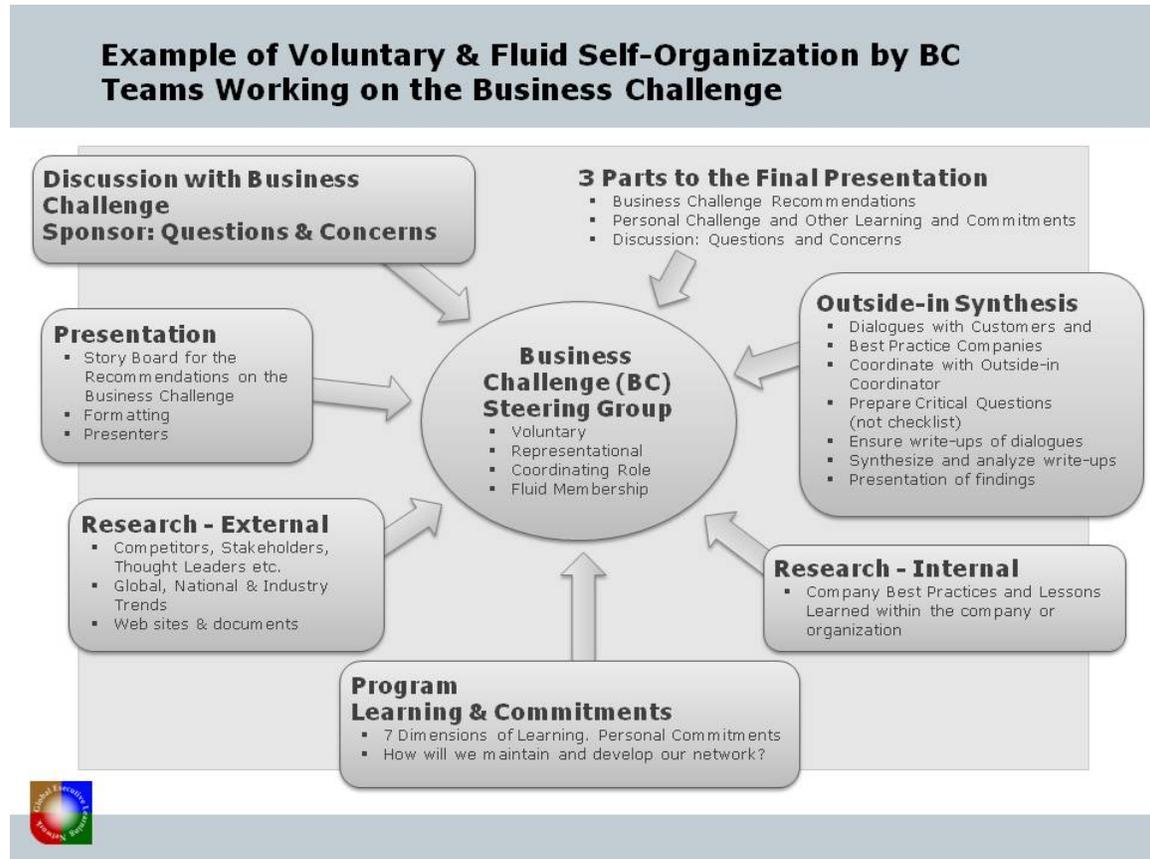
In looking back at BDAL programs and their Business Challenges several clear themes emerge and these are as follows: (Boshyk 2010, 83-84)

- What are some exceptional growth-related opportunities in “emerging” markets?
- How can we accelerate growth in “mature” markets?
- What are some key future trends and how do we “get to the future first”?
- How do we stimulate innovation?
- What are some critical elements that we need to consider for our strategic and sustainable growth?

Each one of these Business Challenge themes and questions is accompanied by a detailed background document that outlines the reasons why this is a company issue, challenge or opportunity, and contains a detailed list of what is expected from participants tackling the Business Challenge(s) in the management or executive program. Internal and external subject matter experts provide background on the Business Challenge, but this a lesser component of a BDAL program. More importantly, participants are encouraged by the senior team to ask fresh questions about the Business Challenge so as to come up with innovative recommendations. In some companies, like General Electric, no participant was allowed on such a program if they had expert knowledge about the Business Challenge in order to ensure that this principle was practiced.

Participants self-organize themselves for work on the Business Challenge, and this often tests their leadership and interpersonal skills. Some companies have up to forty-two people in a program and they are left to their own devices to self-organize. The figure below (Figure 2) shows how one group of thirty-two participants in a ten-day company BDAL program organized themselves in their work on the Business Challenge. These were voluntary sub-teams and membership was fluid but all had the same goal: to prepare a presentation to their senior executives in their company about their recommendations on the Business Challenge, their learning from the program and work on both the BC and the PC, their Personal Challenges and their commitments to deal with them,

followed by a discussion with these leaders on all aspects of their company and its business.



Of course, parallel to this work, the Action Learning “sets” meet regularly throughout the program to discuss their Personal Challenges.

BDAL: Exploring New Opportunities And The Importance Of External Perspectives—The “Outside-In”

In any BDAL program, the external perspective on a Business Challenge or Personal Challenge is present as required, be it from “subject-matter experts” or from the “Personal Development Advisor” (PDA), sometimes referred to as a “coach”. But more importantly, connected to work on the Business Challenge is a very critical component of the BDAL method-- the “Outside-Ins” or dialogues with all external interlocutors and stakeholders relating to the BC. These are people who, in Revans’ words, “know, care, and who can do something about “ helping participants solve and make good recommendations on the Business Challenge. (Revans,1982) Participants are encouraged to ask open-ended questions of these people and not prepare information checklists.

Working in small teams of two to three people, each team takes the time and makes the effort to learn as much as possible about the dialogue partner and their business. This is not “industrial tourism” or what is sometimes called “a discovery event” but a serious and thorough process of capturing, analyzing and sharing new perspectives from the “outside”. Each meeting is written up thoroughly and then shared with other members of the larger team of program participants. Each write-up also has a section on their learning from the experience, using the Seven Dimensions of Learning mentioned before. Eventually, this completed write up finds its way to the program web site for even more sharing within the entire company after the program. The preparation of these meetings involves a major effort in order to ensure proper alignment and

relevance for participants, and the company, and for the external dialogue partners. This element of BDAL works best when there is collaboration between internal subject-matter experts and external specialist organizers before and after a program. This important component part of BDAL, the “outside-in”, has been described in more detail elsewhere. (Levy, 2000) It aligns well with Revans’ approach (although he was more understated) and the more modern version of “value creation” from the “outside-in”. (Foy, 1977; Magretta, 2002, 19-42; Pietersen, 2002)

The results from work on the Business Challenges in these programs have usually been positive. For many companies, there is no need for a Return on Investment (ROI) analysis of a BDAL program because the results are so clear. In the opinion of one very successful practitioner in Asia: “if there is a request for an ROI on a BDAL program, either there is lack of trust in the process or the people involved”.

But there were of course times when the BDAL programs did not go as well as anticipated especially regarding the quality of the recommendations on the Business Challenge. The shortcomings, as perceived by the “sponsors” and participants have little to do with the organizational arrangements. When companies report a less than successful result on the Business Challenge(s) they usually mention the following:

--lack of clarity by senior executives, and lack of alignment with participants on the Business Challenge and the expected “deliverables” by both executives and participants;

--participants who were not appropriate for the Business Challenge: usually too junior, inexperienced or chosen for the wrong reason (on occasion, as a reward for their previous performance or length of service), and were not able to understand the Business Challenge and lacked the business acumen needed to solve the problem or challenge;

--dysfunctional teams working on the Business Challenge that were not able to agree and to work together;

--some teams lacked the courage to say what they really thought about the Business Challenge and hence their recommendations lacked depth and clarity; their presentation was less than committed and hence unpersuasive.

BDAL: Also Focuses Explicitly On The Learning

In the BDAL definition and in the Figure below it is stated that at the same time participants are working on the Business Challenges and the Personal Challenge, there is also a focus on learning from these activities. The learning is explicit and takes several forms. Furthermore, “reflection” is embedded in the learning. Revans, as has been mentioned by several commentators, did not separate out “reflection” from learning; he saw this as a natural part of learning because “questioning insight” involved reflection. We have already seen that “questioning insight” is present in the BDAL method when dealing with the

Business and Personal Challenges, and with the “outside-ins”. Participants are “reflecting” throughout the program and there are even times specifically allotted to learning and sharing reflections with the rest of the group. In BDAL participants working on both the Business Challenges and the Personal Challenges are also asked to record their learning in “learning journals” and to reflect as often as possible on their own, using the **Seven Dimensions of Learning** guidelines. Every participant and every team involved in activities throughout a BDAL program are asked to address the following dimensions of learning:

1. **About the “The Big Picture”:** What do I want to/ did I learn about the external environment of my business, industry, country, region? (About politics, economics, society and culture, technology, and other matters outside of my business).
2. **About My Organization:** What do I want to/did I learn about my organization (its culture, way of doing business, customer relations, values and other things).
3. **About My Teamwork:** What do I want to/did I learn about my team effectiveness?
4. **About Myself:** What do I want to/did I learn about myself? About my values?
5. **About How I Learn:** What did I learn about how I learn?
6. **About What Can be Used in Another Context:** From my learning, what can I apply in another situation?

7. **And Who Needs to Know About My Learning?** Who else needs to know about all of this learning (points 1-6)?

Among other things, in BDAL a point is made of capturing and sharing the learning through a program web site. It becomes the repository and the centre of information, knowledge, and collaboration before, during and after a management or executive program. Naturally, the learning from dealing with PCs and BCs remains on the web site for both private and general use and for post-program alumni networking.

BDAL: Individual Self-Awareness and Development

As participants work on the BC and the PCs, and as they learn and reflect on their behaviours and that of others in the course of this activity, assistance with clarifying their PCs is also provided by a Personal Development Advisor (PDA). This is usually a qualified and business-experienced person with a background in psychology. A participant is given feedback on how others perceive him and his behaviours (using a 360 degree feedback report), how the person sees themselves (through some psychometric assessment such as the Caliper), and how the person has learned to learn (through the Learning Style Questionnaire from Peter Honey and Alan Mumford). This feedback is provided in one-on-one meetings throughout the program and sometimes after. From these discussions and through learning and reflection on their behaviours and experiences throughout

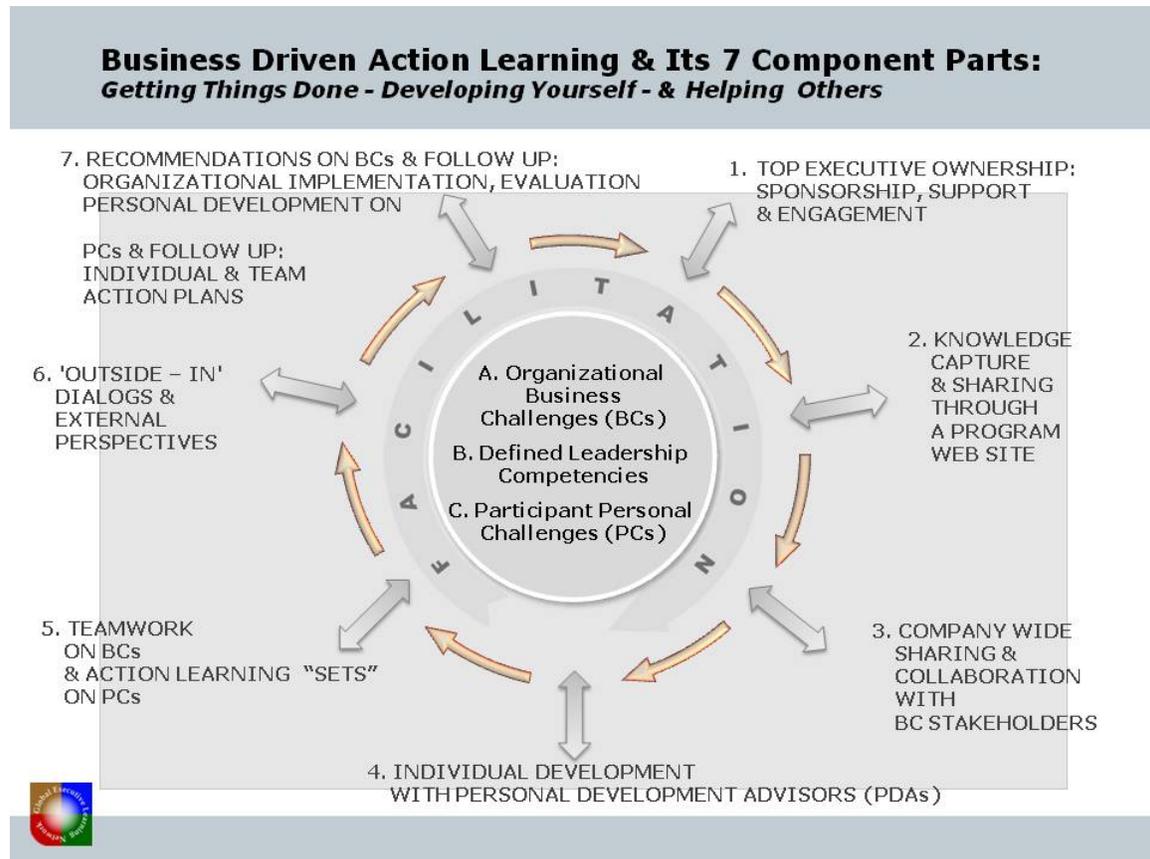
the program, participants are expected to develop their Personal Development Action Plans.

The greater part of developing self-awareness comes from the learning and reflection that occurs throughout a program, in the interaction with colleagues on both the BC and PCs, and through both explicit and implicit platforms provided for learning. We have already mentioned the Action Learning “sets” in this context, but other approaches are also used in a BDAL program. For example, peer-to-peer coaching in small groups of two are also effective in developing self-awareness, as is the approach of having participants paired to share their thoughts about some “searching questions”.

BDAL: More than Just a Program-- Accelerating, Enhancing and Sustaining Change, Longer-Term Organizational and Business Performance, and Individual Leader Development.

As we have seen so far, a BDAL program has many “moving parts”. In a complete and holistic BDAL management or executive program there would be “**Seven Component Parts**”. Besides the Business Challenge and Personal Challenge, BDAL would include: senior executive ownership and engagement; a web site for knowledge capture and sharing; the mobilization of all stakeholders and the collective intelligence of the organization; individual development; teamwork on the BCs and Action Learning “sets” on the PCs; “outside-ins” or external perspectives; and finally, recommendations on the Business Challenge

and sharing of Personal Challenge learning with follow up on both. These “component parts” are summarized in the figure below:



We have already mentioned that BDAL can also be used beyond programs and this is why the “Follow Up” Component Part should be seen as just as important as the program or “event”. Unfortunately, many organizations do not spend much time, nor do they devote enough resources to this aspect of BDAL. Those organizations that do spend the time and resources find that there is an easy transition to an appreciation that BDAL can be used in “on the job” contexts, with in tact business teams, in helping boards make decisions on such things as strategy and investment decisions, with alumni networking and so on.

There are many ways to keep the action and the learning flowing. In the case of Daimler Benz (at one time DaimlerChrysler), BDAL alumni are seen as “change agents” and are called upon to help others in the company. (Braun, 2000) And sometimes this very same role is done voluntarily and on top of existing job responsibilities. (Philip, 2010) In other cases, program participants are asked to help implement their BC recommendations by helping in fact teams that have been charged to do so but who did not take part in the BDAL program. The sharing of the learning back on the job, with their peers and superiors also takes place and in some companies, it is expected as well. The “outside-in” experience is often used by participants back on their jobs in order to rethink the business and relations with stakeholders, including customers through the dialogue process. Mentoring is another popular form of follow up as is “peer-to-peer coaching”. Action Learning “sets” of alumni and others self-organize after a program and these “sets” sometimes include peers from outside of the company, just as with mentoring practices. As can be seen, the possibilities are infinite, as Jack Welch once recalled when speaking about the impact of learning and change on his organization or as the physicist, Freeman Dyson stated, some things are “infinite in all directions”. (Welch and Byrne, 2003).

3. Conclusion

Today BDAL is different from what it was in its initial stages. It has moved from its “Americanized or modified” roots to embrace a more balanced Action Learning

method with clearly defined principles and elements of practice that also integrate those to be found in Reg Revans' traditional Action Learning model. Even by contemporary Action Learning standards, as defined recently by several commentators, BDAL today falls clearly within their criteria as well. (Pedler et al. 2005; Willis, 2004; Mintzberg, 2004). And, as we have tried to show, BDAL has also deepened Action Learning practice by establishing a more comprehensive approach to the principle of a required "outside-in" or external perspective. BDAL has gone well beyond the integration phase to become a method that can be used in a holistic way to address and resolve problems and dilemmas faced by organizations, their managers and executives.

It is a positive phenomenon within the "house of Action Learning" that most practitioners are ecumenical and tolerant of others and their experiments. It could be different. Chris Argyris has written about the acrimonious disagreements in the "Action Research" community. (Argyris, 1997, 811) Thankfully, we in the Action Learning community have managed to avoid this. We have focused on what is more important--that Action Learning, as with BDAL, is at its foundation deeply concerned about helping others to help themselves through mutual collaboration and learning—be this a company, public sector organization, or a team of "partners in adversity". Of this we can be justly proud. We are certain that there are more experiments with Action Learning to come.

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