



Action Learning

A Case Study in Measuring a Leadership Development Intervention

CBODN Presentation

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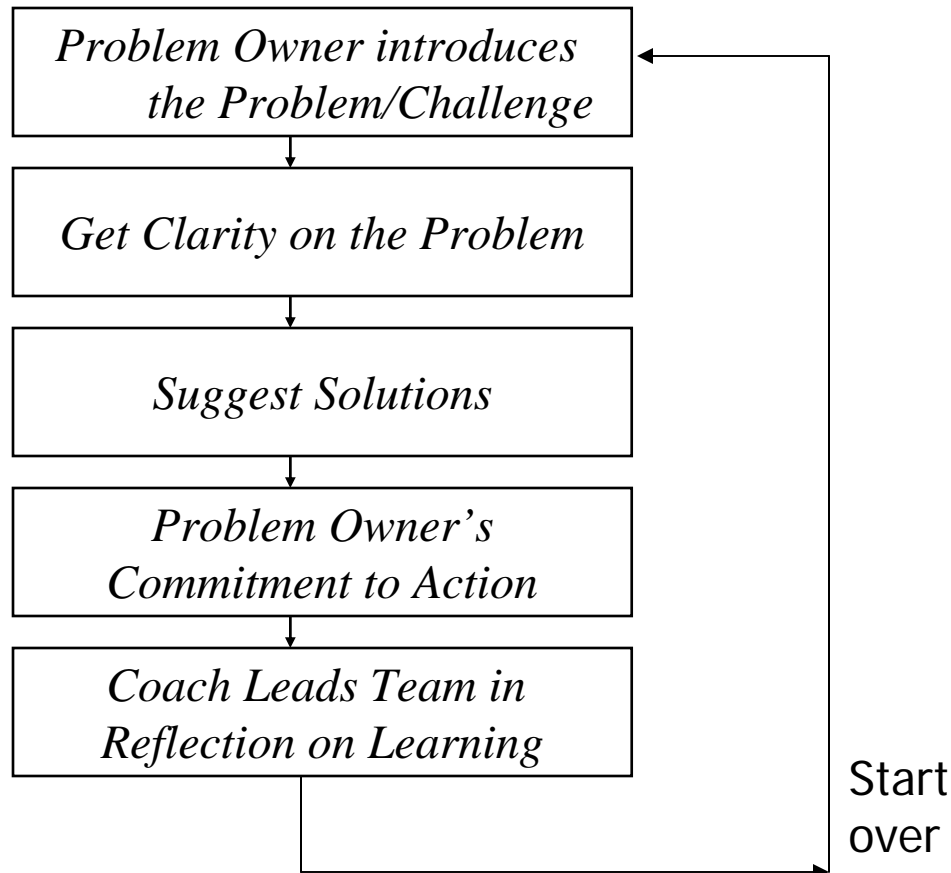
Action Learning Intervention

1. Real problem, challenge, or task
2. Group of 4-8 committed people
3. Use of reflective questioning and listening
4. Commitment & accountability for *Action*
5. Focus and commitment to Learning
6. Action Learning Coach

“A process that involves a small group working on real problems, taking action, and learning while doing”

Michael Marquardt, *Action Learning in Action*

Action Learning Cycle





Stated Client Needs

- “The driving force behind the program is the rapid growth that has accompanied the success of our business area. The ultimate goal is to continue to develop our leadership skills so that we can continue making our clients and our business successful.”
- “We are here to develop skills in client relationship management, team management, self-management, and relationship building with our peers, managers, and staff.”



Our Design

- A 6-month program including eight **action-learning** sessions with **one-on-one coaching** between the meetings.
- Each 4-hour action-learning session focused on the challenge of one of the eight members. Each session was supplemented by **leadership lessons** covering a specific topic drawn from participant needs.
- ***Leadership and Self Deception*** was required reading and formed the basis for **personal introspection**.
- **Measurement** was an integral part of the design.



Measurement Framework

Level	Type of Data	Data Collection Method	Value of Information	Difficulty Assessment
1	Reaction, satisfaction	Questionnaires, surveys	Lowest ↓ Highest	Easy ↓ Difficult
2	Learning	Testing		
3	Application of training	Multiple (observation, assessment)		
4	Business Impact	Assessment (cost, output, quality, time, customer/employee satisfaction)		
5	ROI	Assessment (benefit-cost ratio)		
6	ROI (+ Intangible benefits)	Assessment (non-monetary value added)		



Return on Investment

- Classic Definition
 - Financial focus
 - $(\text{Financial Benefit minus Cost}) / (\text{Cost})$
- Emerging Definition
 - Broader focus taking into account intangible benefits (e.g. customer/customer satisfaction)
 - The challenge is valuation of the intangibles



Common Intangible Variables

- Increased job satisfaction
- Increased organizational commitment
- Increased employee tenure
- Reduced absenteeism
- Increased innovation
- Increased customer satisfaction
- Improved teamwork
- Reduction in conflict
- Improved decisiveness
- Improved communication
- Reduced employee stress
- Improved work climate
- Self confidence
- Increased client trust
- Fulfillment



Measurement Strategy

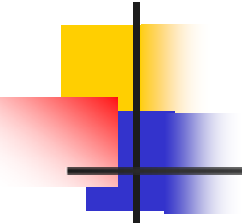
Level	Type	Status
1	Reaction, satisfaction	P
2	Learning	P
3	Application	P
4	Business Impact	P
5	ROI	E
6	Intangible Benefits	E

P= Planned

E=Emerging

Developing Metrics

Levels 3-6



Skill Application	Business Impact	ROI	Intangible benefits
Time management			
Delegation			
Problem resolution			
Risk taking			
Listening/ comms			

Developing Metrics

Levels 3-6

Skill Application	Business Impact	ROI	Intangible benefits
Time management	Priority task completion	Productivity increase	Stress reduction
Delegation	Team member competence	Team promotion rate	Employee loyalty
Problem resolution	Collaboration	Innovation rate Span of control	Peer trust & support "Focus on fit"
Risk taking	Proactive marketing	Broader business base	Self-confidence Respect
Listening/ rapport	Client competence	Increased revenue	Client trust & loyalty



“Baseline” Measurements

- Performance assessment interviews
 - Focused on strengths and areas for improvement in relation to business objectives/customer needs
 - Conducted with participants, participant’s managers, and participant’s customers (internal and external)



“During” Measurements

- * After 2nd Session - Go/No Go Question:
 - “Is this process worth continuing?”
- * Action Learning – Feedback embedded:
 - “What are we learning about leadership...?”
 - “How can we improve our learning?”
 - “Tell us about your progress toward the commitments you made in the Action Learning Coaching session.”
 - Observations in group interaction
- * Coaching: Feedback
 - What are you learning about yourself?”
 - “What improvements do you see in your performance?”
 - “How is the process working?”
- * Client Management Feedback:
 - “Are you seeing any change in behavior on the job?”



"After" Measurements

- Methods:
 - Interviews of participants, managers, customers
- Measurements
 - Satisfaction with delivery
 - Learning
 - Business impact
 - Tracking of adherence to commitments made during the Action Learning Coaching Sessions to improve business impact
 - Participant and management reported improvement in business impact
 - ROI (TBD)
 - Intangibles
 - Participant and management reported improvement



Participant Feedback

- “Action Learning caused me to look into problems deeper. It **deepened my ability to analyze both business and people issues.**”
- “Action Learning gave me a **structured way to take time to think about me.** Most classes in leadership lasts for a day or two, here it is different. I am accountable for changing my behavior, and I have a commitment to report in three weeks. **It forces me to continually modify my behavior and take time for myself.**”
- “**I am more self aware** as a result of this program. People have come to me and said ‘I’ve enjoyed working with you in the last six months.’”
- “**I feel less isolated....** I now have a **support group** to help me solve problems.”



Assessment Results

Level	Type of Data	Value Assessment
1	Reaction, satisfaction	Very High
2	Learning	High
3	Application	High
4	Impact	High
5	ROI	TBD
6	Intangible benefits	Very high

Key Challenges for the OD Community



- Integrate measurement into interventions without driving cost up significantly
- Bring intangibles into play
 - Valuation of intangibles (put them into the equation)
 - Showing linkage between intangibles and bottom line financial results
- Continue to develop interventions that have more immediate (and lasting) impact



Takeaways

- Build measurement into the engagement design
- *Action Learning Coaching* facilitates measurable progress through its *commitment to action*.
- Emphasize ***Intangibles*** and develop means of valuation



References

- Mike Marquardt, *Action Learning in Action* (2001)
- Arbinger Institute, *Leadership and Self-Deception* (2002)
- Jack Phillips and Ron Stone, *How to Measure Training Results* (2002)