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Dear Reader,

Action Reflection Learning has been used for decades in the design and implementation of all kind of learning interventions. One typical instance is as the underlying methodology to develop an organization's leaders, while they work on real challenges that require action. This month we are featuring an interview with Learning Coach Nancy Rehbine, PhD, who conducted such a program in a large retail organization in Puerto Rico!

Enjoy the reading!

Isabel Rimanoczy
Editor

Quote of the Month
"Failure is simply the opportunity to begin again more intelligently." Henry Ford 1863 - 1947

LIM NEWS

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ACTION REFLECTION LEARNING IN ACTION

Working on Critical Business Challenges While Developing Leaders

An Interview with Nancy Rehbine, PhD[1]

LIM NEWS: Nancy, tell us about the program to develop leaders in Puerto Rico you implemented using ARL, Action Reflection Learning.

NR: I was familiar with action learning as a way to develop leaders, and particularly I liked the ARL approach, which in my opinion enriched the design and the experience. So when I was approached by the VP of Organizational Development of a major retail organization I didn't hesitate to accept the challenge.

LIM NEWS: What was the original request they made to you? What did they say was the goal of the intervention and how did you begin?

NR: The program was aimed at 24 senior leaders from Advanced Auto, a retail automotive aftermarket parts and services business. The General Manager, who I will call Albert here, identified four major business challenges. He also had several other issues he wanted to address - to find his successor, to overcome resistance to change, to develop a new culture, to strengthen the management team, and to improve several individual performance problems. The group was divided into four teams. Each team was assigned a different challenge by Albert, as the challenge sponsor. Albert provided each team insight into the problem and committed himself to support the team during the 9-month leadership development program. He also participated as a team member.

LIM NEWS: In what way did he participate as a team member?

NR: He helped to work on solutions to improve sales. We asked him to commit to play

the role of a team member, not of manager.

LIM NEWS: How did you help him avoid being too influential in the decisions of the team, because of his natural authority and position?

NR: We coached the team members to give honest feedback. They were asked to answer the question, "What stands in the way of you working together as a team?" The feedback helped Albert understand his role as a team member instead of using a highly directive leadership style. The feedback provided him insight into the styles of his managers. As a result he was able to modify his style and grow as a leader. In the past, the managers feared their Monday morning staff meetings. Now they look forward to presenting their weekly reports to Albert. He softened his approach, learned to ask questions, and coached his team to find solutions to problems.

LIM NEWS: Did the teams have Learning Coaches?

NR: Yes, each team had a learning coach who helped them by providing support, feedback, and just in time learning when needed.

LIM NEWS: How often did the team meet?

NR: The teams met two days per month over a nine-month period. Each team was required to work on its project during the month prior to attending the workshop. They provided a status report at the beginning of each workshop. This was required as a learning experience to strengthen their English-speaking skills and develop presentation skills.

Once the team was assigned a business challenge, they assessed the need, identified the problem, determined solutions and set measurable goals. Each team monitored its own progress and provided a monthly status report. The Sponsor, Albert, the four coaches, and team members gave each team feedback on the effectiveness of the projects and recommendations for improvement.

LIM NEWS: Can you give an example?

NR: One team was headed down the "wrong" road. They didn't take responsibility for the business challenge assigned. Because the percentage of shrink, lost inventory or inventory improperly removed from stock, was high, the team decided to train employees how to remove inventory properly from stock, instead of working on a solution to the whole

problem. They didn't recognize the importance of resolving the problem and the impact on the organization. They focused on the solution to the problem without investigating its root cause and made some assumptions that were wrong. Also, they decided to work on only one problem that was assigned to them instead of three problems that the Sponsor had assigned to them. During their project presentation, the Sponsor was very disappointed and came down really hard on them. They were shocked to hear this feedback plus that of the learning coach. However, they quickly regrouped and started to address the real issues using the ARL Problem Solving Model. The result was all three problems were resolved and a significant improvement was gained and shrink was reduced significantly.

LIM NEWS: How did you address the different personal learning needs?

NR: Each team member was asked to develop a learning plan based on five levels - organizational development, business improvement, leadership, team and personal improvement. A 360-degree feedback instrument was used to assess their current leadership competency level. Participants were rated on their level of leadership competence and received feedback from their peers on areas that needed improvement.

After meeting with the general manager and team members, the learning coaches carefully designed each workshop to address the issues and concerns of both parties. Workshops started with an introduction in which team members shared a personal accomplishment or success they had accomplished during the month. Then each team presented its status reports and received feedback on the presentations and progress using effective feedback - what was successful, and what they could have done differently. Learning coaches carefully facilitated the process. The workshop design also included opportunities to work personal and professional areas of their development plans. Each participant had opportunities to discuss personal issues and receive coaching and feedback from their peers. These individual coaching sessions were invaluable to increasing their own self-awareness and self-management skills.

LIM NEWS: What were some of the contents of the sessions?

NR: Each session focused on team issues such as communication, leadership style, process improvement, cultural differences, trust, ethical behavior, problem solving, and addressing conflict. The tools were provided on a just in time basis when needed. For example, as the group needed to understand the position of the General Manager on some issues, we implemented a fishbowl interview. This helped to clarify many of the team's assumptions and beliefs. An appreciative inquiry activity was very powerful in helping bridge the gap between the old regime of senior leaders, those who were there prior to Albert's arrival, and new members of the leadership team. When team members shared

how much they appreciated each another they realized the value each person brought to the team.

LIM NEWS: Can you give us some examples of the projects the teams worked on?

NR: The team projects were critical to improving the region's sales and revenue. One was about process improvement, and since they have many retail stores, the project was aiming at improving processes in HR, accounts receivable, payroll scheduling, and computer down-time. The delays were costing the company excess time and money. The group identified the problem, developed a survey to identify the causes, and identified several possible solutions using a new problem solving tool. As a result in less than three months changes were being filed on a timely basis, invoices were submitted weekly on time, weekly payroll schedules were to budget, and computer downtime had improved significantly. Overall, this team has saved the organization thousands of dollars per week. Currently, they are monitoring progress and beginning to work on new business challenges. One of the team members found two accounting errors resulting in a savings of over $600,000 to the company.

Another project aimed at improving net earnings by 5%. Team members visited stores and practiced coaching their general managers to identify issues and problems impacting sales and cost of sales. They were surprised how people responded to them when they used this technique. Prior to starting the project, net earnings were at 2.6%, but increased to 4.5% in less than 3 months and over 5% in 7 months.

LIM NEWS: Did other teams use a similar approach, I mean, to coach the store managers and involve them in finding solutions?

NR: Certainly. Another team coached store managers to improve their auditing process prior to conducting the audit. As a result, they were able to reduce the volume of shrink (an unauthorized withdrawal from stock) and improve this shrink rate by 80%.

LIM NEWS: These seem very technical, tangible bottom line results. Were there also results on the soft skills side?

NR: Well, actually the key to success to achieving business results was based on behavior changes in leadership styles and communication. By asking questions, involving others in finding solutions, coaching and giving feedback, leaders were able to find solutions to problems that were impacting the business goals.

LIM NEWS: What were some of the tools the Learning Coaches introduced?

NR: During the monthly two-day workshops, participants learned a variety of tools and processes from each other and from the coaches. Teams learned contracting for roles and norms; how to reach consensus agreement; forming problem statements as questions and generating ideas by reflection, journaling and dialogue; communication skills - listening, questioning, verbal and non-verbal empathy - respect and trust building; feedback; goal setting; relationship building, coaching skills, team building skills, and evaluation skills.

LIM NEWS: How would you describe the roles of the Learning Coaches?

NR: Coaches provided individuals and team members with feedback frequently during each project or activity. Often coaches intervened during the session to help the team stay on track or focus on the project goal or problem solving process, and feedback was critical to the development of both the team and the individuals. Coaches helped team members set goals on five levels - personal, professional, as a team member, as a leader and business partner. Constructive feedback was given to all team members by the coach and the team after each discussion. Recommendations were written down in a learning journal.

LIM NEWS: Tell us about the workshop design

NR: The workshops were designed to meet the needs of the individuals and business challenges. The Coaches partnered with the client to develop the agenda. Often the agenda changed as the needs of the team or individual became more apparent. Most workshops began with an introduction, forming the team, selecting the problem question, contracting roles and responsibilities, beginning the project, and receiving feedback and just in time learning from the coach. Each consecutive workshop began with a summary of what was accomplished during the month by each team, and lessons learned. Often activities were introduced to develop competencies in coaching, giving and receiving feedback, questioning techniques, team building activities, project management, process improvement, and other just in time training activities.

LIM NEWS: What were some of the challenges or obstacles you had to face?

NR: Designing the workshops to meet the client's needs. Also ensuring that all the participating coaches were sufficiently familiar with ARL. Providing Just in Time Learning on the spot was difficult at times but so rewarding when the tool was helpful to the group process**.**

LIM NEWS: What advice do you have for someone who wants to design such a

program?

NR: Determine the client's needs and desired outcomes up front. Develop a design to achieve the goals and outcomes. Measure success. Be prepared - spend adequate time designing each workshop, talking to the participants and sponsor to collect feedback. Have a well-trained staff of coaches with a broad background in coaching, facilitation, ARL tools and training. Modeling - always stay in the ARL coach role so participants observe how the skills are demonstrated. Ensure participants contract for working on their project deliverables during the month. Follow up with them during the month to determine progress and have them report out at the beginning of each session.

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