Best Practices for Action Learning Projects: What to Consider

Best Practice #1: Determine the right balance between development and performance.

Action learning projects are excellent vehicles for:

1. Helping executives develop and practice specific, strategic skills and behaviors,
2. Providing an organization with potential solutions for some of their most critical issues, and
3. Building cross-divisional trust and cooperation.

Before selecting topics and team participants, it is important to determine what percentage of the goal of the project is developmental and what percentage is to get the very best solution. Typically, the overall goal is a combination of the two, but it is important to determine this balance first.

For example, if the projects are part of an executive education program or some other developmental process, then it is important to have the team members work on topics in which they are not an expert. The project should stretch them by having participants apply the skills and behaviors they need for their own development. Sometimes, however, the quality of the outcome is more important than the potential for learning. Then team members should be experts in the topic.

Team membership and topic selection can best be determined once this balance has been decided.

Best Practice #2: Select topics that are meaningful to both the participants and the organization.

Whether a project is driven by an educational need or an organizational need, the issue should be a real, current unresolved problem or opportunity that does not have an already determined "right answer." If the project does not have several viable solutions, participants may feel the project is "busy work" and not of real value to them or the organization. If some other group of executives is already working on a similar topic, the participants may feel they are doing the dirty work of this other group.

The creators of the topic should be sure to:

1. Describe a successful outcome for the project without giving a specific solution. For example, a successful outcome might be:
    a. Finding the right supply chain process that will take half the time it now takes, or
    b. Recommending a potential alliance based on an analysis of whether or not it will add market share and is aligned with the firm's strategy.
2. If there is a developmental aspect to the project, be sure to describe the specific new skills and behaviors team members will apply as they participate in this project.

Best Practices #3: Select the right participants and team size.

For developmental projects, be sure there is an appropriate balance of participants for whom the assignment is a stretch and participants who have some knowledge of the topic. Typically, for a team of 4-6 participants, we recommend that one or two participants have expertise in the project topic. Be sure the participants represent a diversity of points of view to maximize learning and creativity.

If building cross-divisional trust and cooperation is one of the goals of the project, be sure there is a mixture of divisions represented on a team.

A team should not be so small that a few people can dominate or do all the work and not so big that some people will not be engaged. Our experience and research has shown that projects groups should have between 4-6 members for maximum learning and productivity.

Best Practices #4: Determine an appropriate length and intensity.

In general, project participants are expected to either work on the project full time for a specific amount of time (typically 2-6 weeks) or work on the project in addition to their "normal" workload for a specific amount of time (typically 3 months).

While working full time on a project has some advantages, such as minimizing distractions, it is important to determine whether the participants' day-to-day responsibilities can by assigned to others (which actually provides a developmental opportunity to those other people). It is also important to determine if the project is the type that can be accomplished in a concentrated period. For example, is all the data the group needs readily available or will there be a time delay to collect data? A hybrid option is to have participants work on the project for one week and come back as a group a few weeks later.

For projects that are to be completed while participants are also doing their normal jobs, we recommend a time frame of three months. If the project takes more time, participants tend to lose momentum and interest in the project. The issue should not be so simple it can be solved in a few hours, nor should it be so complex that it will take more than fifty hours per person for the group to recommend a course of action.

In addition, it is important to:

1. Minimize the possibility that the project will overload the participants and perhaps create resentment
2. Maximize the fact that the participants are working on a strategic project for the firm, not just taking a break.

Best Practices #5: Select appropriate project sponsors.

Each project team should have an executive sponsor, a senior executive who can provide guidance on:

1. The content of their project
2. The logistics of getting the work done (getting needed resources, access to needed data, etc.), and
3. Gaining acceptance by the company's other senior officers.

The ideal sponsor should:

1. Have a stake in the successful resolution of the issue
2. Have the time to devote to helping participants solve the issue
3. Have the authority to manage an agreed-upon portion of the project team member's time if the sponsor is not the participant's direct supervisor
4. Have access to the resources needed by the team to successfully complete the project
5. Be available during the project kick-off and at the final presentation

Best Practices #6: Determine subject matter and logistical support for project teams.

It is important to consider what, if any support will be given a team. If appropriate, budget guidelines should be given to teams. Support could include:

1. External subject matter experts (faculty, consultants)
2. Help with gathering data and reports (MBA students, lower-level high potential leaders within the company)
3. An expert team facilitator who can:
   a. Help the group avoid getting bogged down in dysfunctional behaviors
   b. Provide developmental feedback to the group and individuals
   c. Help link the project to other developmental programs (succession planning, talent management, etc.).
4. Administrative support

Best Practices #7: Ensure participants have the needed team skills and support to have a productive team.

Team members are usually very focused on getting the task done and do not pay enough attention to dysfunctional dynamics on the team (1 or 2 people dominate, people do not listen to each other, conflicts remain unresolved and block consensus, etc.). Dysfunctional dynamics not only impact the quality of the team's performance, but also interfere with the ability of team members to maximize learning and development of needed skills. Consequently, we recommend that:

1. Participants have prior training in basic group dynamics including:
   a. How to design productive meetings
   b. The importance of clear goals, roles, ground rules and decision making processes
   c. Group problem solving skills
   d. Giving and receiving feedback
2. A person trained in facilitation skills leads the meetings. Often a trained process facilitator is needed to help a group become aware of and resolve dysfunctional dynamics.

Such skills and support are especially critical is it has been determined that the goals of the project include building cross-divisional trust and cooperation.

Best Practice #8: Provide monitoring of team progress.

It is important to monitor a team's progress. Since project teams are often virtual teams and there are pressures to focus on their "day jobs," project work can slip off the radar. The executive sponsor or someone with project team oversight should check the team's progress regularly.

We recommend "pulse checks" every 3-4 weeks to monitor how teams are doing both in terms of their dynamics as well as progress on their project plan.

We also recommend that at the two-thirds point into the project, the team should be required to have a face-to-face dress rehearsal of their presentation. If there is more than one team working on projects, we recommend that each team present to the other teams to get their feedback. This dress rehearsal:

1. Forces team member to "get their act together" prior to the last minute
2. Gives teams enough time to get good feedback and make any necessary adjustments in their presentation.

During these sessions, we give teams tips on how to make powerful presentations including:

1. Does it generate a felt need for change?
2. Does it communicate the benefits of changing?
3. Did you thoroughly explore both the risks and benefits of your recommendations?
4. Does it recommend next steps?
5. Does it present a specific and concrete business plan for accomplishing your proposed recommendations?