The 7 Most Important Rules for Successful Action Learning Projects

Action Learning Projects bring leadership learning to life. And they can have a life of their own!

Even after ten years of designing and implementing these projects as part of leadership development programs, involving more than a thousand participants across Asia-Pacific, we are still learning. But we’ve hit the pause button, and captured what we now regard as our seven most important rules to ensure Action Learning Projects achieve their learning objectives, add value to the organisations in which they occur, and stay (mostly) under control.
Why Action Learning Projects?

Action Learning Projects (ALPs) have long been a popular element to many leadership development programs. However, as many learning professionals will have experienced first hand, they can be the crowning glory of an effective program, or a crashing disappointment that derails the enthusiasm and learning of a participant group. In this briefing, the HFL team share 15 years of experience on what have become our critical success factors for ALPs.

The Concept of ALPs

For most learning designers the idea of action learning is to provide an opportunity to participants in a learning program to put their learning into action on a “real life” project.

At HFL, most of the 200 leadership programs developed over the last few years have contained an ALP component. This work has enabled us to develop some firm views about how these projects are best set up, and what pitfalls to avoid.

The definition of an action learning project, sourced from Wikipedia (see box below) suggests they consist of several components – a real life problem, a team (that is usually deliberately made diverse), a process of discovery that enables team members to deploy new skills, an outcome that is real and actionable, and a commitment to learning on behalf of those involved. We might also add that the “learning to task” balance should be heavily skewed to the former and that the group operates with a level of independence and self regulation in order for the learning to occur.

A Wikipedia definition of Action Learning

**Action learning** is an approach to solving real problems that involves taking action and reflecting upon the results. The learning that results helps improve the problem-solving process as well as the solutions the team develops. The action learning process includes (1) a real problem that is important, critical, and usually complex, (2) a diverse problem-solving team or "set", (3) a process that promotes curiosity, inquiry, and reflection, (4) a requirement that talk be converted into action and, ultimately, a solution, and (5) a commitment to learning.
## Poor Setup Leads to Poor Outcomes

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<tr>
<th>“Group hijack”</th>
<th>“Presentationitis”</th>
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<td><strong>Group hijack</strong> – where a business sponsor takes over the operation and direction of the group, with the group effectively considered additional resources. The participants endure extra work loads under intense pressure, with little or no learning occurring. Group hijack leads to reputational damage to the program as most past participants will not advocate joining it.</td>
<td><strong>Presentationitis</strong> – where the group focuses on delivering a compelling presentation at the end of the project, rather than on delivering a compelling solution. The focus shifts to looking good in front of peers and senior stakeholders, rather than on producing substance. The only real learning here relates to presentation skills and time management insights.</td>
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<td><strong>Dying on the vine</strong> – where a solution that has genuine merit and has been embraced at presentation stage by senior leaders, withers through a lack of follow up and executive sponsorship. The learning that participants get here is that their employer is all talk and no action, and that perhaps their creative energy is best deployed in another organisation.</td>
<td><strong>Under-estimation</strong> – where busy and professional team members are led to believe that an ALP is a simple add on to the “main” parts of the leadership program. An ALP has far more moving parts, and interfaces with the organisation at many more points, meaning the investment in time for those organising the initiative is usually very significant.</td>
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### How best to avoid these poor outcomes?

A starting point might be to use HFL’s Seven Rules for successful Action Learning Projects, and the critical questions described on the following pages, as an audit tool for your own project designs. We present our Seven Rules in the spirit of sharing and collaboration.

### Authors

This document was written by Jennifer Scott and Alistair Gordon, both Principal Consultants at HFL Leadership. The authors would like to acknowledge input from Joanne Greenlees, now at ARUP, who created HFL’s first action learning “Rules” in 2012.

### About HFL Leadership

HFL is a specialist leadership development firm that helps clients identify and develop leadership culture and capability. Our vision is to ensure every employee in every organisation is led by a leader they wish to follow. Our mission is to help every leader in every HFL client lead better. We partner with organisations to co-create business-savvy, blended leadership development solutions that deliver enhanced business results through outstanding leadership.
SUCCESS FACTOR

#1

Clearly define learning objectives
Case study: “Senior leader Action Learning Projects”

For more senior leaders, a business challenge project is more likely to be chosen, particularly if the learning objectives are to do with business acumen, strategic thinking and customer centricity for instance. One objective at this level is often to improve the participants’ exposure to the entire organisation, building cross divisional teams.

For frontline leaders or emerging leaders our rule is “keep it simple”. Focus them on the experience of coming together as a new team, the stages teams go through, how ideas are generated, decisions made, disputes resolved, and how people influence one another. For these leaders, develop a practical initiative that would improve the working experience of every employee of the organisation. Organisations often choose social responsibility projects for emerging leaders.

Case study: “Frontline Action Learning Projects”

There is a trend to deploy geographically and operationally diverse groups, to help them learn how to work together as a virtual team. Make sure that logistics and systems are in place to make this work practically. A frontline supervisor on shifts with little or no access to meeting rooms or a computer will find it difficult to properly contribute to this type of design.

Remember virtual teams need virtual tools

Choosing a long list of learning objectives is dangerous – our experience is that a focused approach is best. A strong focus around enabling personal skills and practice of team skills (planning, collaboration etc.) are best for more junior project groups. Strategic thinking, solving business problems, and applying business acumen are recommended for more senior groups.

Avoid Over-engineered objectives

I. CLEARLY DEFINE THE LEARNING OBJECTIVES

- What do the participants most need to learn?
- What experiences would help them do that?
- What learning can be achieved within the context of the action learning group?
- How do we design the project so that learning and task are either in balance, or balanced towards learning?

CRITICAL QUESTIONS
Appropriate project selection is critical
2. APPROPRIATE PROJECT SELECTION IS CRITICAL

What type of project will be deployed?

● A business project:
  ● What is important to the organisation right now? Which areas of potential opportunity are there? Are there recurring business problems that demand fresh thinking?
  ● What tangible results does the organisation expect the teams to achieve?
  ● Can the required learning be strongly linked to the business issue?
  ● Who cares about the results that the project group is expected to achieve?

● A more general/social project:
  ● Are the partners (often a not-for-profit) set up to properly support the project teams?
  ● Have the managers of the participants been sufficiently briefed and have they bought in to non-business-work being pursued by the participants?
  ● How can the project be aligned to organisation vision and goals?

● What level of freedom are we going to give the project groups in choosing their topic/issue?

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CRITICAL QUESTIONS

Project groups will be more committed to outcomes if they have had a significant role in choosing project topics. If you become too prescriptive, engagement will decrease. Avoid the desire to want to control topics – your area of control is elsewhere.

Group hijack is a danger when choosing projects. For business projects, the action learning project should be something no one is currently working on as part of their remit. Choosing an external not-for-profit partner requires careful due diligence, to ensure the project groups will enjoy freedom to creatively apply new thinking, and not be simply leveraged as extra funding resources.

HFL likes to deploy projects that are "of the business, but not in the business." Ideally, it should be a challenge that is "whole of business" and can have broad application, and be an issue that the business is not currently working on. Existing projects that have already been slated for execution are not good for learning purposes, and we generally advise clients to avoid them.

HFL has had great success with future-focused projects. These projects address issues that will face the organisation in the future, and focus on possible responses. These projects are ideal for embedding commercial and strategic thinking, and innovation culture. Those organisations wanting to move to a more customer-centric mindset will also find this type of topic effective.
SUCCESS FACTOR

#3

Define the project scope
3. DEFINE THE PROJECT SCOPE

- What needs to be done, by when, by whom, for whom?
- What criteria will the project be assessed against, and why?
- What freedoms, and what constraints, will the project groups be working under?
- To what stage should the project be taken – presentation of idea, clearly shaped business case, or a more detailed plan for implementation?
- What will success look like?

CRITICAL QUESTIONS

Agreeing assessment criteria is critical

The definition of assessment criteria is critically important, and this needs to be agreed with the business sponsors upfront, prior to briefing the project groups. You’ll also need to remind those assessing the project outcomes what the original agreed assessment criteria was, otherwise they may apply a different set of rules many months later at the end of the project.

Be creative and always try and include an outward focus. Project groups have a tendency to become very internally focused, and if your scope insists upon external focus this will help the project groups deliver more effectively.

Focus on outcomes not activities

Presentationitis comes into play here unless the designer is careful. If the project group ends up focusing on the presentation as the outcome, the design has failed. Notwithstanding that developing presentation skills might be one of the defined learning outcomes, the real outcome should be a workable, deployable idea that is within scope and that is properly understood, and then embraced and acted upon by the organisation.

Determine the end game, setting expectations very clearly. Project groups should have clear deadlines that list deliverables, and these should ideally be staged rather than a single point of delivery near the end of the project.

Case study: “Business case”

HFL often sets the objective for the group in terms of outcome rather than activity. An example of this is where we set a task for a group to produce a business case, which needs to be presented to the business. In our scoping discussions with the project team, we emphasise that the quality of the business case is what will be assessed, not the quality of the presentation.

Organisations who would like their technical staff to be better at effectively pitching technical solutions to the business would benefit from this type of approach.

Case study: “Project milestones”

HFL often assists the project groups with the development of a defined project plan with key milestones at the beginning of a project. It could be argued that part of the learning for participants might be to discover at the end of the project that “we should have had a project plan”, but a better (and more common learning) is that “we didn’t stick to the project plan”. Our objective is to set the project group up for success, without telling them what to do every step of the way.
Plan and choose supporters carefully, and engage them early.
4. PLAN AND CHOOSE SUPPORTERS CAREFULLY, AND ENGAGE THEM EARLY

- What options do we have, and which are we going to deploy, when and why? (Choices include external action learning coach, mentors (often subject specific), business sponsors, managers, others)
- What attributes and commitments do we need from external supports for them to qualify for inclusion in the program? Have we made it clear what the extent, and boundaries, of their roles are?
- How much time is required from external supports?
- How much time is each participant expected to spend on these projects?
- Have we clearly articulated the importance of the balance between learning and task to all support participants?

**CRITICAL QUESTIONS**

**Too many moving parts is a problem**

Beware of too many moving parts. Every supporter added takes a great deal of managing and briefing. In our view, fewer support mechanisms properly set up and operating well work much better than an over complicated multi-layered approach. Remember, whoever is designing the project will be running the relationships with all contributors.

**Volunteers need qualifying**

Beware of keen but over-committed volunteers. Your CFO might be very keen to be involved, but they may not have time to add the support the project groups need. If their diary is impossible, they may even end up unwittingly derailing the project. You ought to qualify the supporters as much as you do the participants. Since it is often difficult to retract an invitation (particularly to someone senior), pre-qualifying time constraints prior to an invite is a better approach. If the proposed supporter is senior and has a personal assistant, you’ll typically get an honest appraisal of time availability from the assistant very quickly.

**Clarity roles assertively**

Be assertive about what the role of supporters is and isn’t. Make boundaries very clear. For example, mentors for project groups are not supposed to tell the group what to do, and need to commit to not doing so. External leadership coaches often can play an important role in managing these interventions. When we say “assertively”, we mean explaining to supporters the learning objectives and pointing out that these will not occur if supporters play inappropriate or unplanned roles. Give briefings to supporters early on and then regularly throughout the project cycle.

**Case study: “Regular Support”**

HFL often assists project groups with ensuring that learning is continuous and “in the moment” along the journey by providing action learning coaching. While this can take many forms, some of our most successful action learning projects have been supported by a coach working actively with the groups when they come together. We have also seen projects supported by internal coaches, but this has rarely been successful when the coach is also the sponsor. We’ve found an external coach has the ability to manage internal stakeholders who are trying to derail the learning agenda sometimes more effectively than an internal L&D resource, who may struggle to manage a very senior sponsor.
SUCCESS FACTOR
#5

Build constant feedback loops into the design
5. BUILD CONSTANT FEEDBACK LOOPS INTO THE DESIGN

- What check-in regime does the action learning project need in order to ensure the project groups are on track, or that they get support when they need to get back on track?
- How will we ensure that all participants are actually participating, and valuing the investment of time and energy?
- How will we ensure that all supporters (internal and external) are actually participating, and valuing the investment of time and energy?
- How will we ensure that all of the managers of participants are seeing and valuing the investment of time and energy being put in by their team members?
- How will we ensure that learning occurs along the way, rather than just at the end?

CRITICAL QUESTIONS

It’s a thin line between nanny-state and supportive infrastructure

In a typical 3 to 4 month project, a couple of short 30 minute phone check-ins, at strategic moments, allows key L&D stakeholders to see how project groups are progressing, and will allow the groups an opportunity to ask for help, should they require it. It gives them an opportunity to hit pause and reflect on where they are at.

Feedback from organisational supporters can vary in quality

Supporters can become fixated with progress “on the task”, and typically worry that project groups are behind schedule. This feedback needs to be taken with caution, because groups can quickly catch up, and naturally tend to accelerate towards the end of the project. The key feedback required from supporters is around “are they working together well, do they focus on outcomes rather than activities”, and so on.

Learn to relax. Participants need learning space

It is important to give the participants some space to find their way with their projects. The majority of projects end well if they are set up well. But most journeys are bumpy and that’s natural. Our role is to ask how they are going to navigate challenges, not tell them how to do it.

Case study: “Learning check-ins”

In a typical 4 month project we would have at least one “learning check-in”. The purpose of this is for the group to stop and consider what they have learned so far. The secondary purpose is to consider what still needs to be done and what are they missing, etc. It is also an opportunity to check on support they are getting from other elements of the program. At HFL, we would also typically have a “first run through” of the groups’ presentation/deliverable about a fortnight before they are due to deliver. This almost always teases out critical gaps, and refocuses the project group on assessment criteria and who they will be presenting to.
SUCCESS FACTOR

#6

Have a clear, high impact ending
Case study: “Document insights”

On a recent Asia Pacific assignment where HFL ran seven multi-cultural projects teams, we ended up producing a “what we learned” document, filled with tips that the participants gave themselves regarding what they needed to do differently next time. This was a tremendously valuable exercise, but took time and effort.
SUCCESS FACTOR #7

Have an off-boarding strategy
Case study: “One more time”

At HFL we encourage clients to allow project groups to come together “one more time”, to talk through experiences and in particular focus on what they would do differently next time. We also encourage participants to have conversations with their managers to share lessons, and to discuss what opportunities for involvement in real business projects will be available to them. This will allow lessons to be immediately applied in their jobs. Many mentors to maintain relationships with participants. In some designs, those from previous programs are invited to be project mentors on subsequent intakes. This maintains engagement and learning.

CRITICAL QUESTIONS

7. HAVE AN OFF-BOARDING STRATEGY

○ What’s next for the participants?
○ How can we maintain participants’ engagement and extend their learning past the end of the project and program?
○ What’s next for their projects? How do we ensure great ideas don’t get lost?
○ What’s next for the designers? What did we learn that needs to be fed into the next action learning projects initiative?

Avoid the anti-climax

Typically, by the time the project ends, the participants are exhausted, having worked very hard to get everything ready in the last few weeks and days of the project’s life. If there is a presentation, there is the immediate high of having survived the ordeal, followed in the days and weeks afterwards by a corresponding low – unless the design manages to ensure otherwise. Participants need a clear path for what is next, particularly since the presentation often marks the end of the whole leadership program, not just the ALP.

Ensure production systems are in place

The ending of the project is quite possibly the beginning of the next stage of the project. Making sure systems and procedures for getting accepted projects into “production” is a critically important part of the project design. Ideally, the process for this would be discussed when designers are talking to the business about assessment criteria, right at the beginning of the project.

Don’t let lessons get lost

Capture final feedback from all parties into design lessons immediately so that important lessons are not lost. It is amazing how quickly critical lessons fade from our minds as other work and projects take over.

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We help leaders lead better.

Strategy without execution is a **daydream**. Execution without strategy is a **nightmare**. Either without leadership is an **illusion**.

At HFL, we believe:

- No business should spend a dollar on leadership development unless it is clearly linked to the execution of organisational strategy.
- The most sustainable, effective leadership investments are those that persuade participants to commit to self development.
- This is achieved through customised programs, not one size fits all, and the creation of individual journeys.
- Leadership development should be a priority for every leader in the organisation, regardless of their seniority.
- We become a trusted partner by looking after your leadership investments as if they were our own.

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**LEADERSHIP DEVELOPMENT**

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A unique development program for technical experts to help them build business focused knowledge practices.
We know, as one of many leadership consultancies out there, you have many **choices**. And we know how important **good fit** is.

Here is our 90 second guide to whether our approach fits yours.

**Good fit**

- Access to all relevant stakeholders is possible, including very senior executives
- Senior level ownership as well as sponsorship
- Appreciation of value of customised solutions
- Highly experiential approach to design, and strong facilitation orientation rather than ‘training’
- Value a pragmatic approach; deliver ‘news participants can use’ approach
- Willingness to explore different development journey options
- Value a blended approach to leadership journey design
- Strong measures based around a strong business case is critical and valued
- Preference to innovate and constantly improve effectiveness of initiatives via evidence based feedback
- Desire for capability transfer
- Start with small, pilot approach to prove our value

**Poor fit**

- No opportunity to engage with senior stakeholders
- Leadership development is considered a ‘tick the box’ exercise by senior leaders; lack of commitment from senior leaders
- Preference is for off-the-shelf, pre-designed solution
- Preference for a very structured, page by page delivery; trainer/teacher at the front of room approach
- Overly academic approach
- You have designed the training program and just need a facilitator
- Workshop or event focus, rather than participant journey focus
- Measurement not required or considered important
- Preference for tried and trusted
- Cost driven instead of outcome drive
- Safe global brand required

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