

# Leadership development

## 20 good practice guidelines when using Action Learning

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Based on research by Henley Management College and the successful Skills for Business network Action Learning project we managed over the period 2004 – 2006, we have established the following 20 points of good practice. They describe how to set up, run and assess Action Learning programmes or 'sets'. To find out how we derived these and how the project was managed please refer to <http://www.sfbn-mandl.org.uk/leadermodel.htm>

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### 1. Qualified participant

The target for this programme is a (micro) SME owner manager. The individual should be someone who has real influence in the business, can make decisions and commit resources. In exceptional cases it may be acceptable to include nominees from the principal of an organisation if they meet the above influence criteria. It is important that all participants make a commitment at the outset to remain involved for the duration of the programme.

### 2. Bringing a business issue

Every individual attending must bring a personal business or organisational issue with which they are grappling. An action learning approach must be based on trying to resolve a real business issue or concern. As this model is focused on leadership the issue should be strategic and concerned with leadership, business direction and organisational change, rather than operational or managerial issues. The facilitator should determine if the problem is strategic enough to develop leadership capability. This may require some iteration with the participant as the issues initially presented are often symptomatic rather than the core (strategic) problem. (Refer also to 5 below.)

### 3. Leadership skills diagnostic

It is important that each participant completes a skills diagnostic to establish base knowledge and gaps in their experience. This is important data for the facilitator when designing the shape of the programme. It should be completed as part of the screening process prior to selection and will inform the discussion of the business issue at the pre-launch meeting at the client's site. (Refer also to 5 below.)

### 4. Facilitators

The facilitators for the programme should be based in the locality because knowledge of the local business environment and infrastructure will help establish credibility and minimise travel. A minimum of two facilitators are needed for the

programme to allow for flexibility and back-up. Ideally, they should have complementary styles and skills. The facilitators should have good facilitation skills and experience of working with SME owner managers as business consultants rather than training providers. (Refer also to 15 below.)

### 5. Pre-launch meetings with facilitators

Prior to start up, it is important that facilitators meet potential participants at their normal place of business. This enables the facilitator to ensure that the participant is qualified to take part in the programme and to make sure they will benefit from the experience. This is a crucial part of gaining the commitment of the participant to the programme. (Refer also to 1, 2 and 3 above.)

### 6. Duration of programme

The ideal timeframe for an action learning based programme is 9 to 12 months. This will depend, however, on how many participants are involved, the type of issues being addressed and the relative knowledge and experience of the group. Six months is a minimum period that should be considered, (and should exclude the main summer or winter holiday periods). Another desirable objective is to leave the group as a self-sustaining set at the end of the programme. (Refer also to 19 below.)

### 7. Evaluation

It is important to build an evaluation process into the programme. Learning and transfer of learning into the participant's business should also be assessed. Any impact on business performance should be captured as the programme develops and particularly after the programme is completed. This information can be used for improving learning processes and will provide important case study data on overall effectiveness of this type of development. This can be used to encourage other SME owner managers to become involved.

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### 8. Venue for the programme

An appropriate learning environment such as a business/conference centre with appropriate on-site support should be chosen.

### 9. Set size

The ideal set size is 9 to 12 qualified participants in order to accommodate non-attendance due to holidays, personal issues and business demands. (Refer also to 1 & 2 above and 11 below.) If the set is smaller than this number, absences will reduce the group to an unworkable level and the programme should be discontinued. With too low numbers, there will not be the diversity of expertise required to enable effective group problem-solving sessions, which rely principally on skilful questioning and sharing experience. A set of 9 to 12 will also allow for sub-sets of 4 to 6 participants, which is an ideal size for the discussion sessions. This will require the involvement of 2 facilitators.

### 10. Set location

The set must be locally based. For many people, more than one hour's travelling time to a meeting may result in a failure to stay on the programme, particularly if it is an extended 12 month version. This will, however, depend on geography and accepted travel times and distances for the area.

### 11. Set composition

The set should be diverse and not include local business competitors. It may be across different industries (cross-sectoral) or be occupational clusters. Whatever the case, there should not be too many participants from one background. This degree of mix is important to bring new perspectives to the problem-solving sessions. (Refer to 9 above.)

### 12. Regularity of set meetings

Set meetings should be planned on a regular basis to suit the need of participants. The recommended frequency is every four to six weeks depending on the overall length of the programme and the needs of the learners. Key holiday periods should also be taken into account to ensure maximum attendance levels. (Refer to 6 above.)

### 13. Team building

In order to set the tone, to allow participants to reflect on and openly share their own experience and applications, it is important to create mutual trust at a very early stage in the group. Team building, including social activities, is vital at the outset of the programme. Pre-workshop social events are good ice-breakers and team building exercises at the launch workshop are very powerful tools for encouraging the group to bond.

### 14. Launch workshop

A full day workshop is recommended to launch the programme. This is an ideal opportunity to consolidate team building and reinforce expectations. It is important that there is a component of group-facilitated discussion and questioning about the participants' business issues. It is a good idea to agree all meeting dates for sets and put them into diaries at this workshop. (Refer to 12 above.)

### 15. Knowledge transfer and facilitated group questioning

We believe that a best practice programme will include both of these components. (Refer to 16 and 17 below.) They should, however, be clearly separated.

### 16. Facilitated group questioning

Facilitated group questioning is fundamental to action learning. This activity is powerful and should form the basis of this leadership development model. Good facilitation skills in managing the questioning process are needed. An appropriate facilitator workshop should be made available to less experienced facilitators wishing to work with this model. (Refer to 4 above.)

### 17. Knowledge transfer sessions

Knowledge transfer and input sessions should be explicitly linked to the individual and group business issues brought by participants. Knowledge transfer must be participant-driven rather than facilitator-led. Topics for input sessions may result from the facilitated group questioning sessions. These input sessions should be interactive and may be presented to the whole group, part of the group or as part of a one-to-one coaching session. They may involve the introduction of publications, references and other

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data sources or could be made available through websites. They may be delivered in the one-to-one coaching sessions or could be made available through websites. Experts may be brought in if facilitators lack necessary knowledge. Group members may take responsibility for accessing specific knowledge areas and feeding this back to the group. (Refer to 4 above.)

### 18. Coaching

Coaching is an essential element of this programme. One-to-one sessions are vital, and the duration and frequency should again be participant driven. At least one face-to-face meeting should take place on the participant's site in addition to the initial pre-course meeting. Thereafter, a combination of other communication methods may be used, such as email, web or telephone as preferred by the participant. Mentorship could also be considered to further support participants.

### 19. Close-out workshop

The programme requires a close-out workshop to mark the end of this phase of the learning process.

### And finally . . .

A number of UK Countries, English Regions and some SSCs are now offering programmes that conform with these good practice guidelines and we will continue to encourage others to channel funding into these type of events. As more programmes are run and completed we will build the database of case studies, which demonstrate how effective this form of learning is proving to be. [www.ssda-mandl.org.uk/leadermodel.htm](http://www.ssda-mandl.org.uk/leadermodel.htm)

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It is important to capture the key learning for the individuals and the subsequent impact on their businesses. It is also an opportunity to celebrate success; in many cases, this may be the first or only formal recognition the participant will receive. The workshop is likely to be a very important source of success stories and case studies.

### 20. Post programme process

At the outset of the programme, participants should be made aware of what is likely to happen at the end of the programme. Personal development plans should be in place and ways of staying in contact with each other and with the facilitators should be considered, including the possibility of the group evolving into a self-sustaining set at the end of the formal programme. (Refer to 6 above). In order to evaluate long-term effects, there should be a means of revisiting personal learning and its impact on the business six to nine months after the programme ends. Again, this would be a powerful source of case studies and success stories.