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Foreword

This Virtual Action Learning Guide provides a comprehensive introduction to the principles that underpin effective action learning in a virtual environment.

The Leadership Team at NLIAH have been proactive in introducing a radical approach to action learning by integrating technology and interpersonal skills in a virtual environment.

Using technology as an enabler, the concept of action learning in a virtual environment stretches the critical skill sets of both the facilitator and the participants. It also hones the leadership and management skills that are vital for today’s healthcare organisations as they plan and deliver safe and quality services that provide measurable outcomes and benefits for patients.

Acknowledgements

The authors would like to acknowledge and thank the contribution made by the core programme team at NLIAH who played a key role in the production of this guide including Ian Govier, Andrew Bunn, Paul Schanzer and Christine Bamford. We also wish to acknowledge the influence and support of Ghislaine Caulat and Bruno Dalbiez at Ashridge Business School who helped us on the early stages of our virtual action learning journey and Brian Carroll of Crimzn for creative interpretation of the content and visual imagery of the subject.
Action Learning
What is it?

It’s a continuous process of learning and reflection supported by colleagues, with the intention of getting things done.

A way of learning from our actions and what happens to us, and around us, by taking time to question, understand and reflect, to gain insight, and consider how to act in the future.
What is Action Learning?

Action learning is based on the principle that the most effective learning takes place in the context in which people are working. It is also based on the principle that participants can learn best from what they are doing and that they have an unlimited capacity to learn from their personal experiences but a limited capacity to learn from being taught. Whilst knowledge can be gleaned from books and lectures, it doesn't translate into ‘true’ learning until it has been exposed to the context of our own beliefs, values and the realities of our day-to-day work.

Revans (1982) suggested that when we combine traditional instruction or ‘Programmed Knowledge’ (P) with critical reflection or ‘Questioning Insight’ (Q), we learn a new or effective way of addressing an issue or challenge. This can be expressed as a learning equation:

\[ L = P + Q \]

- **Programmed Knowledge (P)** – to tackle a problem/issue (including advice).
- **Questioning (Q)** – the process of finding the right strategy to use in the circumstance and finding a way to use it most effectively.
- **Learning (L)** – comes from selecting the strategy and using it in practice.

Rather than giving people advice, action learning is about supporting and challenging participants to work on their own issues. They do this within the place they work by considering the personalities, available resources and the changes that may be happening in their organisation.

In other words, action learning can provide a mainstay for those engaged in the difficult and complex world of work, providing them with an opportunity to talk to people experiencing similar struggles and dilemmas. They have the opportunity for support and development, to share the learning arising from their education and put new ideas into practice and have the space and time to reflect on this.

Active reflection on complex work issues is often neglected within the ‘permanent white water’ and operational pressures of day to day work, yet this activity is vital in a fast changing, ambiguous and uncertain environment with its emerging challenges. Reflection is an essential and important component of innovation, improvement and learning, fostering a spirit of enquiry and analysis and developing problem solving, communication and group work skills.

McGill & Beaty (1995) describe action learning as:

“a continuous process of learning and reflection, for an individual, which is supported by the members of the group; the purpose being to get things done.”

Learning happens at three levels. It is about:

- the specific issue being discussed
- what is being learned about oneself
- the process of learning itself, i.e. learning to learn

Briefly described, Action Learning is:

a remarkably simple process that involves a group of people working together in an ‘action learning set’ to explore real problems, learning whilst they do so and then taking action.

(Marquardt, 2004)
There are three key elements to action learning and all are equally important:

1. **Action**

   You work on a live challenge. This is worked on throughout the period of the action learning programme, not just in the action learning sets – it is something that you are working on in the course of your day to day duties, a workplace activity. The challenge or ‘problem’ is something that has no right answer or does not have an answer from current expertise (as opposed to a ‘puzzle’, to which there is a definite answer available). The choice of challenge for a set member is very important. It should be something that will stretch you and will meet your personal and organisational learning objectives. It should interest and excite you, as you will be very close to it for a considerable period of time. It should be a high organisational priority, so the organisation as well as the participant benefits directly from the programme.

2. **Learning**

   You learn through a process of reflection on the action you plan and take, and what is achieved (or not). This reflection is achieved through questioning – asking the right questions and not sticking with favoured solutions. This is different to programmed learning, where a body of knowledge is imparted. Because action learning focuses on problems with no known solutions, questioning is a more effective learning method. Of course, there may be aspects of the problem that can be helped by accessing a body of knowledge or technique, but this happens independently of the set. Thus the starting point in a set is what you don’t know and want to learn about.

3. **Support**

   An action learning programme revolves around set meetings, which usually take place every 4 to 6 weeks. Each set member gets a ‘slot’ to discuss their challenge and what has happened with it since the last meeting. Set members question and comment. In this way, you learn from each other as well as from your own problem. The discussion is not formal and does not require a paper or a formal presentation. You simply need to have reflected on your progress and be ready to share that in a coherent way. You then decide on your next steps. It is important that a set meeting provides both support and challenge (‘warmth and light’). If it provides high support and low challenge, it will be a ‘cosy club’. If it provides high challenge and low support it will be a band of “clever clogs”. Neither will maximise learning and the experience will not be enjoyable or fruitful. Set members are there for one another as well as for themselves. So you need to come to set meetings prepared to participate in a process of collaborative enquiry.
What about ground rules?

A set needs to agree its ground rules at the outset. Typically these will include confidentiality, a commitment to attend all set meetings and a readiness to participate actively and positively throughout them. Action learning is as simple as that. And like all simple things, it can be very powerful. It is useful for set members to discuss the values and principles that underpin the ways in which they will respect and manage difference and the way in which they offer challenge and support. This should include how the set will collectively manage the more difficult issues of conflict when such a situation occurs.

How does action learning work?

- Individuals meet together in a group (known as a set). For ease of working, approximately 5-6 people typically make up a set.
- Each individual brings a real issue/live challenge or project to the action learning set that they wish to progress.
- The whole set works for the benefit of the person presenting the issue.
- The aim for the individual presenting the issue is to be able to take action on the issue and to reflect and learn from the action.
- Typically an action learning set meets for up to one day every 4-6 weeks over an agreed period e.g. the duration of a development programme or a project implementation period.
- The set creates and agrees explicit ground rules (e.g. confidentiality) to build trust and ensure effective working.
- The set is facilitated by an individual outside of the organisation who acts as a catalyst and coordinator, supporting individuals through the process of learning and development.
**Action Learning as part of a problem solving framework**

This guide will focus on the action learning set - which can be facilitated virtually or face-to-face.

Details of how a set is structured and the skills involved will be the focus for much of this guide but it is important to link the *Kolb Cycle* with the problem solving cycle when an action learning set takes place.

*This can be shown as follows:*

**“Double Loop” Learning**

In practical terms, for the set members we are seeking to introduce ‘*double loop*’ learning, beyond the single loop of the Kolb Cycle, into the action learning set to provide a more effective experience and measurable outcomes.

*Derived from Ashridge articles*
Action Learning
In a virtual / audio environment

Action learning which takes place in a virtual/ audio environment, rather than face to face, via a range of enabling, interactive and collaborative communication technologies.

*With increasing numbers of people embracing the internet, and employers wanting informal, flexible learning experiences for their employees, focusing on the needs of their organisation - virtual/audio action learning can be an effective solution.*
The Virtual Action Learning Guide

Action Learning in a Virtual/Audio Environment

Virtual Action Learning (VAL) offers a proven technique to brainstorm organisational challenges, find group solutions and generate innovative ideas. It is also considered to be a more cost-effective method for action learning that also helps to reduce carbon footprint.

VAL is not second best – it offers the same benefits as face to face action learning whilst reducing environmental impact. Research appears to demonstrate that a virtual or audio working environment can actually bring its own unique benefits to the process (Dickenson et al, 2008). The results - sharpened listening skills, the ability to reflect more deeply and greater insight as well as the opportunity to hone virtual leadership skills which are so important for today’s organisations and businesses.

For work based projects to thrive and flourish in an audio virtual world, new skills and a new way of thinking must be introduced. To succeed, audio virtual meetings must be as rich and as multilayered as face to face meetings. Just as visual stimulus is used in face to face meetings to couch the terms of a powerful question, the same is needed in a virtual or audio environment. More feedback is required with reassuring and supporting interventions running alongside questioning. In that way the questions become less sharp when combined with reassuring statements such as “I understand”, “it makes sense”, “OK, I see”. Virtual nodding, in the verbal form of “I see” and “ahhhhh” or “mmmmm” become critical in creating a dynamic conversation, where all set members feel heard and understood.

In developing intimacy, the physical constraints of audio communication can be played to advantage. The senses, stripped of visual stimulus, have to slow down and focus solely on the voice. The natural focus on words and voice amplifies listening skills and allows the listener to go deeper and think seriously about the issue at hand, resulting in thoughtful silence. Programmed, as most of us are in the Western world, to cover up what might be considered embarrassing moments with idle chit-chat in an audio environment, where everything is amplified by ten, imagine the impact on new teams, unused to such yawning silences!

Introducing a controlled element of informality to formal audio action learning sets can help people relax and connect on a deeper level. There is a real need in any kind of virtual team work to find a way to introduce ‘coffee machine’ conversations to the group. Planning fifteen minutes of chat time before the set begins or organising a virtual coffee break half way through the meeting are two simple ways of letting people build a mental picture of the other people they are working with. What did they do over the weekend? What is going on in their work area? In this way our sense of emotional connection is built in small, vivid snapshots.

Establishing a completion ritual at the end of an audio session is an effective way to build an emotionally connected relationship amongst set members. Because of the way teleconferences were built as constructs to exchange information or discuss decisions to be taken, many people end sessions in a mechanistic manner that forgets to value the nature of the work that has been accomplished, as well as the quality of the relationships that have been developing throughout the session. Fifteen minutes at the end of each audio action learning set for members of the team to talk about how they feel about the session, what they learnt and what they value in each other, can be very powerful.

Learning to work with the silence is a powerful skill for leaders seeking to develop intimacy and reflection in virtual team work. Rather than leaping into the content of a discussion and asking what a team member is thinking now, facilitators need to be trained to ask what the silence is about and how the silence feels. Much can be learnt about the relationship of the set by being curious about the nature of the silence rather than the content of the conversation. By letting silence exist, set members are given the space to reflect rather than just saying what pops into their head first. The brain tends to listen harder and hear more because of the lack of visual clues; the connecting environment is more minimalist and makes sense happen in a slower but deeper manner. Better solutions are often the result.

By building trust and intimacy into audio meetings, set members can often do exactly the same kind of work or even more than their colleagues working in a face to face environment. More openness can be achieved quickly and
to a deeper level and the fact that there are no physical constraints can make this a very powerful environment for work. Furthermore, people who learn to work differently in an audio environment develop new leadership skills – such as working more with their intuition, or drastically improving current skills – such as listening, which they can in turn use in a face to face environment. They become more versatile and effective leaders. In creating groundbreaking teams, with the help of effective audio team working, geographic distance need not be a distractor, but an enabler.

Possible Dynamics in VAL Sets

<table>
<thead>
<tr>
<th>Psychological Aspects</th>
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<td>Dis-inhibition</td>
<td>People might open up and go deeper and faster</td>
</tr>
<tr>
<td></td>
<td>People might get more aggressive</td>
</tr>
<tr>
<td>Confluence</td>
<td>The psychological symbiosis between people</td>
</tr>
<tr>
<td></td>
<td>The lack of physical boundaries might induce confluence faster</td>
</tr>
<tr>
<td>Amplification</td>
<td>Emotions might get more inflamed and faster</td>
</tr>
<tr>
<td></td>
<td>Dysfunctionalities in a team or even a group get amplified</td>
</tr>
<tr>
<td>Silences mean words</td>
<td>The silent participants and how to engage with them</td>
</tr>
<tr>
<td></td>
<td>Don’t break the silence but let it unfold</td>
</tr>
<tr>
<td></td>
<td>The shared energy field and the social unconscious</td>
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</table>

Source: Ashridge
Virtual Action Learning
What are the benefits and impact?

When you meet online in a virtual action learning set, you remove many of the constraints that can make meetings or even traditional ‘face to face’ action learning a challenge.
When you meet online in a virtual action learning environment, you remove many of the constraints that can make meetings or even traditional ‘face to face’ action learning a challenge e.g. like getting everyone in the same place at the same time.

With Virtual Action Learning you can:

- Save time and money in travel
- Easily collaborate with geographically distant colleagues
- Eliminate the hassle of e-mailing files and following up by telephone
- Make your meetings more productive and successful

De Haan (2004) lists the following advantages of action learning that apply equally to a virtual environment:

### Individual Benefits:

- Reflecting based on practical situations
- Practising ‘slow thinking’ and the postponement of judgement, providing an opportunity for new connections and answers to arise
- Giving and receiving personal feedback
- Learning from the parallel patterns between behaviour within the virtual action learning sessions
- Safety and mutual support, which enables more comprehensive knowledge to be created
- Making good use of a committed group of ‘listening ears’ and ‘questioning minds’ with a wide variety of experience, background and style
- Being part of a maturing group, increasingly ‘available’ to each other through reflection and review of the process at every major stage
- ‘Normalising’ of behaviours, i.e. creating a sense that ‘I’m just like others’ and ‘others are just like me’.

### Organisational Benefits:

- Skills development
- Personal and team growth
- Enhanced self-confidence to deliver
- Greater self-awareness
- New ways of solving problems
- A clearer understanding of how learning occurs
- Support, challenge and motivation of staff
- Manage change
- Develop partnerships
- Reduce stress
- Return on investment
- A safe and relatively inexpensive place to test out ideas
Return on Investment
Calculating the Return on Investment (ROI) benefits of virtual action learning can be a complex but worthwhile investment of your time. Financial return is not the only kind of return on investment.

You might also consider other factors such as:

Wider contribution:
- This investment may enable you and your team to do other things that improve quality or add value.
- There may be knock on effects that enable other teams to do things that add value.
- Doing this now may enable better quality or performance outcomes in the future.

Business Impact:
- This way of doing things may enable a desired increase or reduction in particular activities.

Job Impact:
- This activity may enable you and your team to do things in a better way.

Personal Impact:
- This may help you and your team acquire learning or insight that enables you to do your job better.

Sustainability:
- This way of working may be more fulfilling and so you and your team may be more motivated to do a good job when doing it this way.

Not all of the above are quantitative measures, some are qualitative and will occur as narrative of some kind. The financial reporting is of course vital but these other return on investment dimensions can help add meaning to what could otherwise be rather sterile figures.
## Evaluating Virtual Action Learning

<table>
<thead>
<tr>
<th>Evaluation Questions</th>
<th>Score 1-10</th>
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<tbody>
<tr>
<td>How effective was the virtual action learning in helping you to understand your key organisational issues/challenges and helping you to address them throughout this intervention (1-10)?</td>
<td></td>
</tr>
<tr>
<td>To what extent has virtual action learning helped you to learn more about your organisational issues/challenges and raised your level of organisational insight (1-10)?</td>
<td></td>
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<tr>
<td>Please briefly list examples of your key organisational learning/insights.</td>
<td></td>
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<tr>
<td>What are some of the attitudes or blocks in organisational behaviour that have changed as a result of virtual action learning?</td>
<td></td>
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<tr>
<td>What changes in behaviour have you noticed as a result of the virtual action learning?</td>
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<tr>
<td>As a result of the virtual action learning, to what extent have you been able to (or will you be able to in the near future) apply your new approach to improve organisational performance (1-10)?</td>
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### Results and Outcomes from Virtual Action Learning

**These are considered at two levels:**

1. **Organisational** – For example, virtual action learning may have helped you to complete your organisational objectives more effectively, accurately or faster

2. **Personal** – Virtual action learning may have led to increased confidence or willingness to address challenges/barriers to organisational progress
<table>
<thead>
<tr>
<th>Results and Outcomes</th>
<th>Score 1-10</th>
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</thead>
<tbody>
<tr>
<td>To what extent has virtual action learning made a real and significant impact on results and outcomes in your team, department or organisation (1-10)?</td>
<td></td>
</tr>
<tr>
<td>To what extent has virtual action learning started to make a real and significant impact to your personal results and outcomes (1-10)?</td>
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<tr>
<td>How confident are you that you will be able to make further performance improvements as a result of the virtual action learning you have received (1-10)?</td>
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<tr>
<th>The Added Value of Virtual Action Learning</th>
<th>Score 1-10</th>
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<tbody>
<tr>
<td><strong>Added Value</strong></td>
<td></td>
</tr>
<tr>
<td>How many hours of virtual action learning have you received (round down to nearest hour) during this particular intervention?</td>
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<tr>
<td>What is your best estimate of the ‘overall quality’ benefit or loss to you and your organisation as a result of the virtual action learning (1-10)?</td>
<td></td>
</tr>
<tr>
<td>What is your best estimate of the ‘financial benefit’ of the virtual action learning to you and your organisation?</td>
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*Adapted from PSMW evaluation tool and Kirkpatrick evaluation model*
Virtual Action Learning
Technology & Collaborative Software

The use of web-based collaborative or conferencing software allows you to connect with anyone, anywhere, in ‘real time’.

The technology combines desktop sharing, through a web browser, with audio conferencing and video so everyone sees the same thing while you talk.
One of the significant benefits from the rapid advances in faster, inexpensive and ubiquitous Broadband Internet is the transformation across Information and Communication Technologies (ICT). Industry sectors that once capitalised on Voice and Data as distinct markets have now converged and continue to innovate with products and services that allow us to communicate and collaborate in new ways - either at our desk, from home or on the move.

The use of technology in Learning and Development isn't new: conference calls via telephone, documents and files accessible on shared servers and Video Conferencing in the workplace or educational environment have been used extensively over recent years. However, these services were often strictly controlled, involved prior scheduling, required expensive equipment - and were often confined to the workplace environment.

Current and emerging ICT solutions have now liberated the workforce Learner. Readily available web-based applications that offer real-time audio and/or video conferencing from a laptop, tablet computer or mobile device now allow you to connect with individuals or dispersed groups for discussion, collaboration and instant sharing of files and resources wherever and whenever you desire.

Of course, just because such transformational ICT services are available doesn't necessarily mean they're required for every Learning interaction. A brief catch-up conversation between a Learner and their coach or peers might be just as effective through a simple telephone call; or sharing a document or presentation with a mentor or group via email deemed all that’s required. But it’s the availability of these new collaborative real-time services as viable and effective tools to groups of Learners that make them compelling options in Virtual Action Learning - particularly as a group ‘meeting’ session can be recorded for either later review or as documented participation as part of a Learning audit or staff assessment.

Services available

The popularity of these new web-based collaboration tools has seen the number of products available to customers rise dramatically in recent years but, perhaps unsurprisingly in a new and highly competitive ICT market, they're often incompatible with each other and therefore require participants to be using the same application.

Popular fee-based products in the current market include:

- Webex
- Go To Meeting
- Connect
- Elluminate

There are also an increasing number of free web-conferencing services available online, although they may have different features due to their ‘Social’ and non-Corporate focus. However, innovation and development in the Social web has been more agile and often stimulates the paid services (above) to also incorporate new features demanded by users.

Since they’re free to use, these services can be a good introduction to online collaboration and give Learners an opportunity to familiarise themselves with key features outside of the workplace.

Two very popular free services are:

- Skype
- Google+

Web conferencing on the move

Many of these products offer mobile conferencing using tablets and smartphones e.g. Webex, Connect and Skype all support access via free apps which are available to download from the Apple and Android app stores.
Social Networking
It is important to recognise the growing importance of social networking services such as Twitter and Facebook as communication channels. While social networking typically offers asynchronous communication, it can be an extremely powerful and simple way of creating a global discussion and sharing thoughts and ideas between participants who are separated by space and/or time.

Key features
Whilst organisations may opt for a particular product or service appropriate for their needs, there are several common key features from all vendors.

Key features of web-conferencing
- flexible license to cater for large or small numbers of users
- free user application is either web-based (used in a Browser) - or a small download file
- voice call can be either (or both) via computer or telephone system
- multiple video streams of users
- meeting roles - including ‘Host’, ‘Presenter’ and ‘Participant’
- document sharing
- live computer ‘Desktop’ sharing
- live and interactive ‘Whiteboard’ for collaborative visuals and diagrams

Some services also provide features familiar in Social Media applications, such as:
- live chat or comments stream
- live ‘Polls’ or ‘Multiple Choice’ questions
- Twitter stream
- ability to play or embed video files

How Web-Conferencing works
Their intuitive interfaces and rich sharing features make Web-based conferencing and collaboration spaces ideal for Virtual Action Learning environments.

To give a flavour of what a typical workflow might involve, we’ve broken down the various steps and identified some key areas of the web-based interface screen on the following pages.

In this example we’re referring to the Webex solution offered by Cisco, but the general workflow and features apply to several other solutions.

1. Creating a Session and inviting Participants
Typically, a user within the license-holding organisation will initiate a ‘meeting’ or session and act as the ‘Host’. They can then send out email invitations to join the session to specific people and assign them roles as ‘Presenter’ or ‘Participant’. The Invitation will also carry a link to the session on the web (1).
2. Joining a Session
If this is the first time you’ve taken part in a web conference, you should check that your computer or mobile device can support the intended application in advance of the session starting.
For Webex, go to [http://www.webex.co.uk/lp/jointest-uk/](http://www.webex.co.uk/lp/jointest-uk/) and follow the instructions to enter the test meeting (allow at least 30 minutes for this). Testing instructions are often included in your invitation e-mail.

When it’s time to join, participants use the link provided by the Host and enter their name and email address to enter the session and identify themselves to others taking part (2).

If you’re unable to access the Internet, you may have the option to join the session by ‘phone.

Depending on the session requirements and content to be discussed, the Host can control whether it is audio-only or video-enabled - the latter allowing users with a suitable ‘Webcam’ camera and microphone to join a video conference.

During the session, Presenters can share PowerPoint presentations and documents, draw on the Whiteboard and even pass Presenter-control to others and, as a result, create highly engaging and participative sessions.

3. Navigating the screen interface
The large screen grab opposite illustrates a typical web-conference session and the main components of the screen interface.

3. Main content window
This is where a Host or Presenter shares Presentations, documents or computer desktop content with session participants.

4. Webcam video streams
If activated by the Host, then webcam streams from all enabled participants will be shown.

5. List of session participants
Participants currently logged-in to the session and icons representing whether they have audio or video (or both) enabled.

6. Discussion or Chat area
If activated by the Host, messages can be sent by one participant to another or, alternatively, to the whole group.

7. Multiple window tabs
Several windows can be prepared for a session and might include meeting information, agenda etc.
The ‘NLIAH Virtual Action Learning Software Guide’ gives more detailed step-by-step instructions on setting up and testing a Webex session and is available on request or at www.learningwales.tv
Virtual Action Learning
Use of Focus Exercises

In a virtual action learning environment, set members can benefit from the use of focus or relaxation exercises.

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The use of Focus Exercises

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The following focus/relaxation exercise scripts are provided as an example although others may be used.

Focus / Relaxation Exercise 1

Start by observing your breathing.

Don't try to change anything about your breathing, just notice the sensations of breathing air into and out of your body.

Try to focus all of your attention on your breathing.

As you become increasingly aware of your breathing, begin to notice other sensations in your body.

Become mindful of the posture of your body.

Notice how parts of your body feel as you sit, stand, or lie down.

Notice where your body makes contact with something; perhaps with the floor, with a chair, with a desk, or with something else. Notice how your clothes feel against your skin.

Observe the sensations in your muscles... along your skin... in your stomach... in your lungs as you breathe air in and out.

Continue to observe all of the sensations of your body, becoming increasingly aware of your physical body.

If other thoughts come into your awareness, gently push them out of your mind and re-focus your attention on your body in this moment. .... continue to be aware of your breathing and when you are ready, we'll bring this exercise to a close and move on together.
Focus / Relaxation Exercise 2

Let your hands rest loosely in your lap, or by your side. Now close your eyes. Take a long slow deep breath in through your nose, all the way down into your stomach. Hold the breath for just a moment, and then exhale through your mouth. Allow your breath to carry away all stress and tension as the air floods out of your lungs.

Take another slow breath in through your nose. Fill your lungs completely. Hold it for a moment...and release the breath through your mouth. Empty your lungs completely with your out-breath. Feel that the tension in your body has begun to loosen and subside. Take a third deep breath in. Hold it for a moment, and then let it go.

Feel yourself relaxing more and more deeply with each breath.

Bring your awareness to your feet and toes. Now breathe in deeply through your nose, and as you do, gradually curl your toes down and tense the muscles in the soles of your feet. Hold your breath for just a few seconds and then release the muscles in your feet as you breathe out.

Now bring your awareness to your calf muscles. Breathe in deeply and as you do, point your toes up towards your knees and tighten these muscles. Hold for just a moment, and then let those muscles go limp as you exhale.

Now take a deep breath in, and tense the muscles in your thighs. Hold for just a moment, and then release all those muscles. Focus on letting them go limp and loose.

Draw in a deep breath and gradually tighten the muscles in your buttocks. Hold this contraction for a few seconds, and then release your breath. Feel the tension leaving your muscles. Feel them relaxing completely. Draw in a nice deep breath and then tighten your stomach muscles. Hold for a moment. Now release your breath and let your muscles relax.

Bring your awareness to the muscles in your back. As you slowly breathe in, arch your back slightly and tighten these muscles....Now release your breath and let the muscles relax.

Pull your shoulders up towards your ears and squeeze these muscles as you breathe in deeply. Now breathe out completely. Let your contracted muscles go loose and limp.

Feel the heaviness in your body now. Enjoy the feeling. Breathe in again. Clench your fists and tighten all the muscles in your arms. Squeeze the muscles as you hold your breath...now release and gently breathe all the way out. Let your arms and hands go loose and limp.

Now tighten the muscles in your face by squeezing your eyes shut and clenching your lips together. Breathe in fully. Hold this for a moment...and now breathe out and relax all your facial muscles. Feel your face softening.

Take a deep breath in, and then open your mouth as wide as you can. Feel your jaw muscles stretching and tightening. Now exhale and allow your mouth to gently close.

Take one final deep breath in, filling your lungs completely...hold for just a moment, and then release and relax. Let all that air carry away every last molecule of tension.

You are now feeling completely relaxed from the tips of your toes to the top of your head. Enjoy this feeling and when you are ready, please open your eyes.
Virtual Action Learning
Key Elements

Key Elements are:

The individual - who joins the group

The set - a group of people who meet regularly in a ‘virtual’ environment

The issue/task - each person brings that they want to work on

The processes - the challenge, support

The facilitator - who helps the group as it works and learns

The outcome - action and learning
Virtual Action Learning
Interpersonal Skills

Key Skills include:

- Building rapport
- Active and empathic listening
- Vocal factors
- Non-visual cues
Building rapport

In a virtual environment, rapport is essential for successful communication; indeed, if there is no rapport there is no ‘real’ communication!

Rapport may be considered as the quality of harmony, recognition and mutual acceptance that exists between people when they are at ease with one another and where communication is occurring easily. In general, we gravitate towards people that we consider similar to us, because people like people who are like themselves – ‘like likes like’.

In rapport the common ground or similarities are emphasised and the differences are minimised. We naturally experience rapport with close friends or in the company of those with whom we share an intense common interest. However the ability to create rapport is a skill that can be learned and which can be used to facilitate our relationship with anybody, in any setting, and even with those with whom we profoundly disagree.

Active and empathic listening

In a virtual environment, the physical constraints of audio communication can be played to advantage. The senses, stripped of visual stimulus, have to slow down and focus solely on the voice. The natural focus on words and voice amplifies listening skills and allows the listener to go deeper and think seriously about the issue at hand, resulting in thoughtful silence.

Programmed, as most of us are in the Western world, to cover up what might be considered embarrassing moments with idle chit-chat in an audio environment, where everything is amplified by ten, imagine the impact on new teams, unused to such yawning silences!

Learning to work with the silence is a powerful skill for leaders seeking to develop intimacy and reflection in virtual team work. Rather than leaping into the content of a discussion and asking what a team member is thinking now, leaders need to be trained to ask what the silence is about and how the silence feels. Much can be learnt about the relationship of the team by being curious about the nature of the silence rather than the content of the conversation. By letting silence exist, team members are given the space to reflect rather than just saying what pops into their head first. The brain tends to listen harder and hear more because of the lack of visual clues, the connecting environment is more minimalist, making sense happen slower but deeper. Better solutions are often the result.

Ways to ‘sharpen’ your VIRTUAL RAPPORT:

* Take a genuine interest in getting to know what’s important to the other person. Start to understand them rather than expecting them to understand you first.
* Pick up on the key words, favourite phrases and ways of speaking that someone uses and build these subtly into the conversation.
* Notice how someone likes to handle information. Do they like lots of details or just the big picture? As you speak, feed back information in the same portion size.
* Breathe in unison with them.
* Look out for the person’s intention – their underlying aim – rather than what they do or say.
* Adopt a similar voice tone and speed.
Vocal factors
In a virtual environment, especially an audio only environment, the speed, pitch and tone of participants’ voices has greater relevance than in a traditional ‘face to face’ action learning situation. For the facilitator this can be particularly challenging as they will need to be able to identify participants from a vocal perspective. This may also present challenges to set participants as they learn to communicate with individuals without any of the usual visual clues that aid identification.

_The ability to recognise and correctly identify action learning set participants will be enhanced by an appreciation of the following vocal factors:_

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**The Power of the Virtual Nod**
Without the visual clues used in face to face meetings, powerful questions that drive the discussion forward in some ‘real world’ meetings can become negative when used in an audio only world. Just as visual stimulus is used in face to face meetings to couch the terms of a powerful question, the same is needed in a virtual environment.

More feedback is required with reassuring and supporting interventions running alongside questioning. In that way the questions become less sharp when combined with reassuring statements such as:

- “I understand”
- “It makes sense”
- “OK, I see”

Virtual nodding, in the verbal form of “I see” and “ahhhhh” or “mmmmm” become critical in creating a dynamic conversation, where all set members feel heard and understood.
Virtual Action Learning
The Problem / Challenge

Seven Useful Questions:
• What am I trying to do?
• What is stopping me from doing it?
• What can I do about it?
• Who knows what I am trying to do?
• Who cares about what I am trying to do?
• Who can do anything to help?
• How can the set help me?
The Problem / Challenge

The following framework may be of assistance in deciding on a suitable problem to bring and present to the virtual action learning set:

Framework for selecting an issue:

1. **Describe the issue in one sentence**
2. **Why is this important?**
   - To patient care
   - To your organisation
   - To your team
   - To you
3. **How will you recognise progress on this issue?**
4. **Who else would like to see progress on this issue?**
5. **How do you intend to go about tackling this issue and what are your first steps?**
6. **What difficulties do you anticipate?**
7. **What are the benefits if this issue is reduced or resolved?**
   - To patient care
   - To your organisation
   - To your team
   - To you
Issue/Problem
The best issues to work on as a Virtual Action Learning set are often complex, of an irregular ‘shape’ (maybe not easily recognisable or explainable), messy (not neat and solvable as a ‘puzzle’ may be), and possibly have some sort of sense of an ‘ongoing, repeating pattern’ about them.

Two helpful guidelines when it comes to choosing an issue are as follows:

Firstly, ask yourself:

- Is the challenge important, significant, complex and real?
- Who, if anybody, needs to approve of my choice of issue?
- Am I certain I will be able to take action on the dilemma?
- What is the time frame for making progress on the issue?
- How would I feel if I were not able to resolve the problem?
- Can I explain what is in my head and heart to other people?
- Am I willing to be challenged on this area of my work, life or personality?
- Would it be most useful to work on a familiar or unfamiliar issue?
- What is troubling me or exciting me about work?

Secondly, from Reg Revans, the originator of Action Learning, ask yourself:

- Who knows about (understands) the problem being tackled?
- Who cares (genuinely wants something done) about the problem?
- Who can (has enough power to) get something useful done about it?

The issue-bringer/presenter comes to the set prepared to share their issue and have the group work on it with them. They will have a unique, personal perspective on the issue and, as they are intimately involved, are often passionate about seeing it solved.

Weinstein (1998) lists several helpful behaviours by the issue-bringer:

- Prepare for meetings
- Structure your time
- Be clear about what you would like – or would like the set – to focus on
- Learn to ask for what you want
- Learn how to get an empathetic response
- Learn how to receive
- Learn how to generate action points

... to which can be added:

- Provide the minimum amount of context for the group to be helpful to you (this saves valuable time)
- Explain what has already been tried and with what degree of success
- If possible, what you see as the options at the moment
Virtual Action Learning Set-members (that is, other than issue-bringer), operate in such a manner as to assist the issue-bringer to move towards a solution. An important point to emphasise is: they are responsible TO the issue-bringer, not responsible FOR the issue-bringer or their issue. They are there to work with the issue-bringer to help the issue-bringer to solve his/her issue.

They may well have their own perspective on the issue, which they should refrain from sharing UNLESS when offered, the issue-bringer agrees, and only then offering after other useful coaching avenues have been explored. This is to offset the potential, but real, danger of seeing the issue-bringer’s issue from their own perspective, with their solutions, associated feelings, thoughts, behaviours, etc. Their aim is to both suspend judgement and the offering of advice/solutions/etc, until they have explored the issue-bringer’s context, perspective and ‘wants’ fully.

Helpful behaviours for Virtual Action Learning Set members:

- **Questioning skills** to help people to find their own solutions to their problems
- **Active listening skills** to communicate to people that they were being understood; to help them work out their own solutions but not give solutions; to help them clarify their situation, the facts, their thoughts, and their feelings; to hear without judging or evaluating
- **The ability to give and receive feedback** to help people learn and develop; to increase their self-esteem and to make them feel valued
- **An understanding of group process** to appreciate the difference between task and process and between helpful and sabotaging behaviours
- **Creative problem solving skills** to provide a range of tools to help the set when they were ‘stuck’
- **The skill of reflection** to plan for future action and to help derive the learning from action
- **Understanding the process of learning** to enable people to appreciate the variety of ways in which people can learn
**In addition:**

- **Agreeing a form of contract** with the issue-bringer regarding the way you will all work together. This would include the degree of confidentiality, time available and how it could be used, what would they like to have as an outcome of the session, any particular way they would want to work, i.e. method used, areas not to explore, etc. To allow mutual trust to grow, it is vital that confidentiality is maintained throughout and beyond the life of the set.

- **Aiming to maintain a respectful and honest approach** to each other at all times.

- **Using a blend of open and closed questions.**

- **Checking in with the issue-bringer** regularly to see if what they are doing at present is still the most useful thing to be doing.

- **Using where necessary, a blend of summarising, reflecting on and reframing.**

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**The arrows,**

their thickness and type, relate to the relationships, the strength of this relationship and their importance or potential danger to the process respectively.

**Firstly,** the arrows are two-way, depicting the mutual impact on one another. For example, the participants do have an impact at several levels on the issue-bringer and vice-versa.

**Secondly,** given the passion involved, the strongest relationship will almost certainly be between the issue-bringer and their issue. Virtual Action Learning set members will use this strong relationship to ask helpful questions from viewing the issue through the issue-bringer’s eyes. The strength of the relationship between all the members of the set would be expected to grow as the set matures through spending useful time together.

**Thirdly,** the solid arrows represent helpful relationships. The broken arrows represent an area of possible danger to the process, namely the limitations by one or more participants holding onto the “yes, we had one of those, and this is how we solved it” mentality. We ALWAYS aim to view the issue through the eyes of the issue-bringer. While the wealth of experience within the group is often a big plus, it can lead to less helpful behaviours. The author has found that this is almost always a topic to be explored during the review phase both at the end of each ‘round’ and at the end of the set meeting. This is especially true when the set is made up of people from one organisation.

**F(?)** This stands for Facilitation

There should always be a facilitation element to the process of Virtual Action Learning. That is, keeping an eye on the process, noticing and feeding back key aspects to the group at or before the review stages. These aspects may have either a positive or a negative effect. It is important to explore the most important of these.

The question mark represents the decision as to whether there should be a facilitator or not. As has been said, there should always be facilitation, but should there always be an ‘external’ dedicated facilitator? It is important to have a facilitator during the early days of the life of the set so that the set can concentrate more on supporting and being supported, but then handing over the facilitation to the set. In other words, the dedicated facilitator should be looking to do themselves out of a job over the first few set meetings. Then the set can decide at any particular time, to either have one of the set take the role of facilitator (say) for a particular ‘round’ or distribute the role across the participants.
Here again is the issue, presented clearly by the issue-bringer including what they will find most useful from the others. This initial stage is often called the contract stage.

Section A:
This section is all about divergence. We open out the issue, asking questions about context, who is involved, what has happened before, etc. Once the issue has been expressed, it is often helpful to ask: What specifically is it about the issue that is of concern? This helps the participants to be clear on which aspect of the issue does the issue-bringer wish to focus on.

Section B:
This section is all about consolidation. This is all about clarifying and testing possible hypotheses, and may involve re-ordering, re-conceptualising, re-framing, or reconsidering the issue. Do the Virtual Action Learning set participants understand what the issue is? Here we may ask them to say what they think the issue is and allow the issue-bringer to add further clarity as necessary. If stuck, and it is seen as appropriate, then some creative methods for looking at the issue from another angle could be introduced. “If this issue was a metaphor (or fairy-tale), then what metaphor (or fairy-tale) would it be, and what would your role in the metaphor (or fairy-tale) be?” This gives the set another language and ‘frame’ to use that often yields new insights, especially for the issue-bringer.

Section C:
This section is all about convergence. We narrow down to (say) the two alternative outcomes X or Y. Popular outcomes for the time together could be new insights, additional options, actions to be taken, increased confidence, seeing where the real problem lies, etc. There should always be a sense of “what next?” about this time. What will the issue-bringer take away and do after the set meeting?

At the end of this member’s time, the group conducts a review of how the session went. This may of course be done by the ‘external’ dedicated facilitator. The aim here is to explore set learning opportunities that will make the next time the set meets, even more effective. We expect, over time, individual, set and organisational learning to occur. Helpful questions for this part of the process include:

To the issue-bringer:
- What was the most useful part of this time?
- What was the least useful part of this time?
- What would you like those who supported you to change next time we work with you?

To the Virtual Action Learning set members:
- What were we most pleased about in the way that we worked together?
- What were we least pleased about in the way we worked together?
- What should we change if anything about the way we work together?
- Do we have any less helpful tendencies which came out in this time? (Common answers to this question include – asking lots of closed questions, offering advice too early, ineffective time management, etc).
- Next time the set meets, the issue-bringer will ‘check in’ with the group at the beginning, saying what has happened and exploring what help, if any, they now want from the group.
Virtual Action Learning
The Role of the Facilitator
The Role & Task of the VAL Set Facilitator

As a VAL Set facilitator, your role is to:

- create a structure for participants to explore their issues
- help each participant stop, think, question and listen about their own issue
- help the set to ask appropriate questions and find the right process so that the participant presenting the question can explore and learn from their own issue
- create the right environment for learning to occur e.g. focus exercises, time keeping and appropriate breaks
- model effective behaviour and language
- encourage awareness of learning
- systematically evaluate with the set participants after each meeting
- keep aware of the process and appropriately draw it to the attention of set members

Things to avoid are:

- providing solutions
- being an expert
- exerting authoritarian control
- being a teacher / chairperson / leader / tutor
- telling set participants what they can or can’t do
- sorting out interpersonal problems that arise between set participants
- being a counsellor
- giving advice
- talking too much

Guidelines for a VAL set adviser/facilitator:

- ensure that set participants tell stories in which they are personally involved and where they have influence over the outcome
- suspend your judgement, put aside your reactions and try to get inside a presenter’s frame of mind and context
- highlight untested assumptions and ask for specific evidence
- when appropriate, feed back your observations about the processes you are observing and those that are missing
- remind participants of their responsibility to manage time and air space
- suggest different ways of exploring issues, particularly if energy levels in the group are low
- be aware of your own thoughts and feelings and feed them back as appropriate
- encourage the group to be responsible for their own feelings and to challenge the behaviour of members in the group as appropriate.
Note keeping

Facilitators should have a notebook for each action learning set to keep a record of the issues brought to each meeting, the actions each presenter agrees to take and notes on any process issues occurring in the group. Some facilitators take a few notes in the session, others afterwards.

Take care not to be so involved with note taking that you cannot observe and facilitate what is going on in the group. Do not become the group note-taker. It is up to others to recall actions, etc.
Virtual Action Learning
The Role of the Participants
As a VAL Set participant, your role is to:

- create the conditions that support learning by giving colleagues time to think without interruptions
- support colleagues through encouragement and practical help
- ask questions and where necessary challenge habitual thinking and assumptions
- being open to the challenge of colleagues and listening to alternative suggestions
- take action by trying something new, both inside and outside set meetings
- engage in the learning process, share the experience and personal insights
- focus on learning, not only on the issue but also what is being learnt about oneself

Things to avoid are:

- providing solutions
- being an expert
- exerting authoritarian control
- being a teacher / chairperson / leader / tutor
- telling set participants what they can or can’t do
- sorting out interpersonal problems that arise between set participants
- being a counsellor
- giving advice
- talking too much

For more information, please see Asking Powerful Questions on p. 51
An understanding of someone’s preferred learning styles and personality preferences, from both a facilitator and participant perspective, can greatly enhance the virtual action learning experience.
In a virtual action learning environment, awareness and understanding of your own, as well as others’ personality preferences and learning styles, can be highly beneficial. A skilled facilitator will enhance the virtual action learning experience by seeking to understand the preferred personality and learning approaches of set members.

There are many approaches to assessing both personality types and learning styles and some of these are described below.

Myers-Briggs Type Indicator® (MBTI®)

The purpose of the Myers-Briggs Type Indicator® (MBTI®) personality inventory is to make the theory of psychological types described by Carl Jung understandable and useful in people’s lives. The essence of the theory is that much seemingly random variation in someone’s behaviour is actually quite orderly and consistent, being due to basic differences in the ways individuals prefer to use their perception and judgment.

Perception involves all the ways of becoming aware of things, people, happenings, or ideas. Judgment involves all the ways of coming to conclusions about what has been perceived. If people differ systematically in what they perceive and in how they reach conclusions, then it is only reasonable for them to differ correspondingly in their interests, reactions, values, motivations, and skills.

The Four Preferences are:

**Extraversion and Introversion**

- Sensing and Intuition
- Thinking and Feeling
- Judging and Perceiving

**Extraversion and Introversion**

When we talk about ‘extraversion’ and ‘introversion,’ we’re distinguishing between the two worlds in which all of us live. There is a world inside ourselves, and a world outside ourselves. When we are dealing with the world outside of ourself, we are ‘extraverting.’ When we are inside our own minds, we are ‘introverting.’

*We are extraverting when we:*

- Talk to other people
- Listen to what someone is saying
- Cook dinner, or make a cup of coffee for someone else
- Work on a car
We are introverting when we:
  • Read a book
  • Think about what we want to say or do
  • Are aware of how we feel
  • Think through a problem so that we understand it

Within the context of personality typing, the important distinction is which world we live in more often. Do we define our life’s direction externally or internally? Which world gives us our energy, and which do we perhaps find draining?

Sensing and Intuition
The ‘SN’ preference refers to how we gather information. We all need data on which to base our decisions. We gather data through our five senses. Jung contended that there are two distinct ways of perceiving the data that we gather. The ‘Sensing’ preference absorbs data in a literal, concrete fashion. The ‘Intuitive’ preference generates abstract possibilities from information that is gathered. We all use both Sensing and Intuition in our lives, but to different degrees of effectiveness and with different levels of comfort.

We are Sensing when we:
  • Taste food
  • Notice a stoplight has changed
  • Memorize a speech
  • Follow steps in a plan

We are Intuitive when we:
  • Come up with a new way of doing things
  • Think about future implications for a current action
  • Perceive underlying meaning in what people say or do
  • See the big picture

Within the context of personality typing, the important distinction is which method of gathering information do we trust the most? Do we rely on our five senses and want concrete, practical data to work with? Or do we trust our intuitions without necessarily building upon a solid foundation of facts?

Thinking and Feeling
When Jung studied human behaviour, he noticed that people have the capability to make decisions based on two very different sets of criteria: Thinking and Feeling. When someone makes a decision that is based on logic and reason, they are operating in Thinking mode. When someone makes a decision that is based on their value system, or what they believe to be right, they are operating in Feeling mode. We all use both modes for making decisions, but we put more trust into one mode or the other. A ‘Thinker’ makes decisions in a rational, logical, impartial manner, based on what they believe to be fair and correct by pre-defined rules of behaviour. A ‘Feeler’ makes decisions on the individual case, in a subjective manner based on what they believe to be right within their own value systems.

We are making decisions in the Thinking mode when we:
  • Research a product via consumer reports, and buy the best one to meet our needs
  • Do “The Right Thing”, whether or not we like it
  • Choose not to buy a blue shirt which we like, because we have two blue shirts
  • Establish guidelines to follow for performing tasks

We are making decisions in the Feeling mode when we:
  • Decide to buy something because we like it
  • Refrain from telling someone something which we feel may upset them
  • Decide not to take a job because we don’t like the work environment
  • Decide to move somewhere to be close to someone we care about

Some decisions are made entirely by Thinking or Feelings processes. Most decisions involve some Thinking and some Feeling. Decisions that we find most difficult are those in which we have conflicts between our Thinking and Feeling sides. In these situations, our dominant preference will take over. Decisions which we find easy to make and feel good about are usually a result of being in sync with both our Feeling and Thinking sides.
Judging and Perceiving preferences, within the context of personality types, refers to our attitude towards the external world, and how we live our lives on a day-to-day basis. People with the Judging preference want things to be neat, orderly and established. The Perceiving preference wants things to be flexible and spontaneous. Judgers want things settled, Perceivers want thing open-ended.

We are using Judging when we:
- Make a list of things to do
- Schedule things in advance
- Form and express judgments
- Bring closure to an issue so that we can move on

We are using Perceiving when we:
- Postpone decisions to see what other options are available
- Act spontaneously
- Decide what to do as we do it, rather than forming a plan ahead of time
- Do things at the last minute

We all use both Judging and Perceiving as we live our day-to-day life. Within the context of personality type, the important distinction is which way of life do we lean towards, and are more comfortable with.

The differences between Judging and Perceiving are probably the most marked differences of all the four preferences. People with strong Judging preferences might have a hard time accepting people with strong Perceiving preferences, and vice-versa. On the other hand, a “mixed” couple (one Perceiving and one Judging) can complement each other very well, if they have developed themselves enough to be able to accept each other’s differences.
**Activists**

Activists like to take direct action.

They are enthusiastic and welcome new challenges and experiences. They are less interested in what has happened in the past or in putting things into a broader context. They are primarily interested in the here and now. They like to have a go, try things out and participate. They like to be the centre of attention.

So, in summary, Activists like:
- to think on their feet
- to have short sessions
- plenty of variety
- the opportunity to initiate
- to participate and have fun

**Reflectors**

Reflectors like to think about things in detail before taking action.

They take a thoughtful approach. They are good listeners and prefer to adopt a low profile. They are prepared to read and re-read and will welcome the opportunity to repeat a piece of learning.

So, in summary, Reflectors like:
- to think before acting
- thorough preparation
- to research and evaluate
- to make decisions in their own time
- to listen and observe

**Theorists**

Theorists like to see how things fit into an overall pattern.

They are logical and objective ‘systems’ people who prefer a sequential approach to problems. They are analytical, pay great attention to detail and tend to be perfectionists.

So, in summary, Theorists like:
- concepts and models
- to see the overall picture
- to feel intellectually stretched
- structure and clear objectives
- logical presentation of ideas

**Pragmatists**

Pragmatists like to see how things work in practice.

They enjoy experimenting with new ideas. They are practical, down to earth and like to solve problems. They appreciate the opportunity to try out what they have learned/are learning.

So, in summary, Pragmatists like:
- to see the relevance of their work
- to gain practical advantage from learning
- credible role models
- proven techniques
- activities to be real
Virtual Action Learning

Ground Rules

- Confidentiality
- Attendance
- Scheduling
- Air Space
- Listening
- Non-interruption
- Empathy
- Open questions
- Respect
- Fun!
Virtual Action Learning

Asking powerful questions to facilitate progress and reflection

“If I had an hour to solve a problem and my life depended on the solution, I would spend the first fifty five minutes determining the proper question to ask, for once I knew the proper question, I could solve the problem in less than five minutes.”

Albert Einstein
Asking powerful questions

In virtual action learning, set members endeavour to ask effective and powerful questions, even great questions. In fact, the better the question, the greater the insight gained and the better the solution.

Marquardt (2004) suggests that effective questions achieve a number of results as they:

- Cause us to focus and/or to stretch
- Create deep reflection
- Challenge assumptions that prevent us from acting in new and powerful ways
- Are difficult to answer and may take courage to ask
- Lead to breakthrough thinking
- Contains the ‘keys’ that open the door to great and innovative solutions
- Are supportive, insightful and challenging
- Are unpresumptuous and offered in a sharing spirit
- Are selfless, not asked to illustrate the cleverness of the questioner or to generate information or an interesting response for the questioner
- Open up the problem owner’s view of the situation
- Open doors in the mind and get people to think more deeply
- Test assumptions and cause people to explore why and how they act
- Generate action

The following are examples of questions that can increase the effectiveness of both action learning set facilitators and participants.

Ref: http://www.actionlearningassociates.co.uk/resources/nacvs.html

Questions for Facilitators – an aid for reflection

- How clear am I on the role and responsibilities of a virtual action learning facilitator?
- How do I enable the set to focus on the learning rather than the detail of the issue?
- What virtual action learning skills can/should I model?
- When is it appropriate to intervene?
- How am I enabling the set to keep to task and to maintain the timetable?
- How can I encourage all set members to contribute their perspectives?
- How can I build an atmosphere of trust?
- How can I enable set members to take more responsibility for their learning and actions?
- Why is it important not to impose my knowledge and view on the set?
- How do I help to maintain a positive atmosphere?
- What am I learning?
- What should/could I be doing differently?
- How do I help the group work towards self-facilitation?
- How do I promote and encourage the idea of recording learning?
- What tools can I introduce to help participants express themselves well?
Questions on how to decide what issue to work on
- an aid for reflection

- Is the challenge important, significant, complex and real?
- Who, if anybody, needs to approve of my choice of issue?
- Am I certain I will be able to take action on the dilemma?
- What is the time frame for making progress on the issue?
- How would I feel if I were not able to resolve the problem?
- Can I explain what is in my head and heart to other people?
- Am I willing to be challenged on this area of my work, life or personality?
- Would it be most useful to work on a familiar or unfamiliar issue?

N.B. People use different words to express their issue as demonstrated above. One way to come up with potential issues to work on is to ask yourself “What is currently troubling, concerning or exciting me about work?" 

Questions for those supporting and challenging the presenter – an aid for reflection

- How do I ensure that I ask questions rather than offer solutions?
- What can I do to show my empathy and concern?
- How do I demonstrate my belief that the presenter is the expert on the issue?
- To what extent do I reflect back what the presenter says?
- How am I helping the presenter to think in different ways about their problem?
- How do I welcome the perspectives offered by other set members?
- What are my motives when asking questions?
- When is it appropriate to support and when should I challenge?
- How does the presenter want me to help?
- What can I learn from this?
- What is my personal commitment to making the virtual action learning set an effective experience for all participants?

Questions for Action Points
– an aid for reflection

These questions might be asked by the supporters or by the presenter of themselves. For simplicity these questions are written as if a supporter is questioning a presenter on their action points. Supporters can continue to ask questions as the presenter describes their action points.

- What do you want to do/improve/change by the next set meeting?
- Who will carry out the action points?
- What might prevent you carrying out your action points?
- Who do you need to work or consult with?
- What is the timetable for carrying out the specific action points?
- How realistic is that?
- What are the competing priorities and how will you handle them?
- What are the risks of acting in this way for you and/or the organisation and/or other people?
- What do you hope to feel when you have taken action?
- If you choose not to take action, how do you justify this?

Action Points help participants to:

- Take a step-by-step approach to problem solving, change and development
- Develop leadership skills as we take charge and reach our goals
- Test our learning back in the workplace
- Identify the support and resources we need
- Help us to make organisational and personal changes
- Become more realistic about how we manage our time
- Recognise that there are many possible solutions
- Stay positive as we realise we can do something
- Learn more about ourselves, our issue, our set and our organisations
- Transfer our learning across the organisation
Questions for all set members when reviewing the learning – an aid for reflection

- What have I learned in this virtual action learning session?
- How have my thoughts about my issue changed?
- How different are my feelings about my problem now?
- What changed behaviours do I notice in myself?
- What is the impact of my learning on my boss, my team and my organisation?
- What helps my learning?
- What hinders my learning?
- What are my learning needs and how can I meet them?
- What more do I want to learn?
- How do I ensure that my learning is transferred across the organisation?

Useful questions for action learning facilitators

- Can we stop for a moment and check how we are doing?
- How do you feel about what is going on?
- I notice we always run over here. How can we approach this?
- How helpful was that comment?
- Perhaps it would be more helpful to turn that comment into a question?
- What questions does that raise?
- Who is helping you most at the moment in the group?
- Mary made a statement that wasn’t picked up. I wonder why that was?
- Energy levels seem low; shall we take a break?
- Perhaps we should check our agreed ways of working
- What are we trying to do here?
- How can we help Paul move forward on that issue?
- What I think I heard Jane say was…
- How can we make this set more effective?
- You have told us about your problems, what about your successes?
- What does that really mean?
- When you say ‘them’ do you actually mean ‘me’?
- What is happening in the group at the moment?
Useful questions for action learning facilitators and participants

### Questions for Focusing Collective Attention on the Situation

- What question, if answered, could make the most difference to the future of (the specific situation)?
- What’s important to you about (the specific situation) and why do you care?
- What draws you/us to this inquiry?
- What’s our intention here?
- What’s the deeper purpose (the big “why”) that is really worthy of our best effort?
- What opportunities can you see in (the specific situation)?
- What do we know so far / still need to learn about (the specific situation)?
- What are the dilemmas / opportunities in (the specific situation)?
- What assumptions do we need to test or challenge here in thinking about (the specific situation)?
- What would someone who had a very different set of beliefs than you / we do say about (the specific situation)?

### Questions for Connecting Ideas and Finding Deeper Insight

- What’s taking shape?
- What are you hearing or noticing underneath the variety of opinions being expressed?
- What’s emerging here for you?
- What new connections are you making?
- What had real meaning for you from what you’ve heard?
- What surprised you?
- What challenged you?
- What’s missing from this picture so far?

### Questions That Create Forward Movement

- What is it we’re not seeing?
- What do we need more clarity about?
- What’s been your / our major learning, insight, or discovery so far?
- What’s the next level of thinking we need to do?
- If there was one thing that hasn’t yet been said in order to reach a deeper level of understanding / clarity, what would that be?
- What would it take to create change on this issue?
- What could happen that would enable you / us to feel fully engaged and energized about (the specific situation)?
- What’s possible here and who cares? (rather than “What’s wrong here and who’s responsible?”)
- What needs our immediate attention going forward?
- If our success was completely guaranteed, what bold steps might we choose?
- How can we support each other in taking the next steps?
- What unique contribution can we each make?
- What challenges might come our way and how might we meet them?
- What conversation, if begun today, could ripple out in a way that created new possibilities for the future of (the situation)?
- What seed might we plant together today that could make the most difference to the future of (the situation)?
Open Questions
The open question does not have one right answer, but gives plenty of space for the contributor to come up with several possible answers, e.g. “What do you remember about your first school?”

The closed question only permits one answer, the right one, e.g. “What was the name of your first school?”

The distinction between open and closed is not an absolute one. Some questions are ambiguous, e.g. “Do you believe in school?” – the contributor may hear this as open or closed. And there are degrees of openness (or closure) e.g. “What do you remember about your first school?” is more open than “What do you remember about the headmistress of your first school?”

In general, open questions tend to be more catalytic than closed questions simply because they give more scope for self-directed exploration and discovery. But there is no hard and fast rule: it depends on the context, and the timing. In any case, the skilled facilitator/listener can ask both open and closed questions as and when appropriate, and can control the degree of openness regarding open questions.

Questions, whether open or closed, need to be contributor-centred, tuned in to the contributor’s reality, and not listener-centred. They are listener-centred when they are tuned to the listener’s curiosity or determination to be proved right, etc.

Finally, questions, whether open or closed, need to be balanced between following the contributor where the contributor is already going, and leading the contributor into new territory.
Virtual Action Learning
Taking Action

“To look is one thing, to see what you look at is another.
To understand what you see is another.
To learn from what you understand is something else.
But to act on what you learn is all that matters.”

Sir Winston Churchill
Questions that help Virtual Action Learning set participants to take action
These questions might be asked by the supporters or by the presenter of themselves. For simplicity these questions are written as if a supporter is questioning a presenter on their action points. Supporters can continue to ask questions as the presenter describes their action points.

Useful questions for supporters to ask
- What do you want to do/improve/change by the next VAL meeting?
- Who will carry out the action points?
- What might prevent you carrying out your action points?
- Who do you need to work or consult with?
- What is the timetable for carrying out the specific action points?
- How realistic is that?
- What are the competing priorities and how will you handle them?
- What are the risks of acting in this way for you and/or the organisation and/or other people?
- What do you hope to feel when you have taken action?
- If you choose not to take action, how do you justify this?

Questions help participants to:
- Take a step-by-step approach to problem solving, change and development
- Develop leadership skills as they take charge and reach their goals
- Test their learning back in the workplace
- Identify the support and resources that are needed
- Make organisational and personal changes
- Become more realistic about how they manage time
- Recognise that there are many possible solutions
- Stay positive as they realise they can do something
- Learn more about themselves, their issue, their set and their organisation
- Transfer their learning across the organisation
Virtual Action Learning Tools & Techniques

“The collection of methods should be regarded as a toolbox from which participants can take a range of different tools to help them work on different issues, problems and cases.”

Erik De Haan
Just as traditional ‘face to face’ action learning sets can be enhanced by the skilful use of a variety of facilitation methods, the virtual action learning facilitator can also draw on a number of tools and techniques to generate creative thinking and action in the virtual environment.

The tools and techniques described in this section can be effectively adapted for use in a virtual environment. Some lend themselves more to virtual action learning sets that use online collaboration software such as WebEx or Adobe Connect, although others can also be modified for use in an audio only action learning setting.

Using WebEx or Adobe Connect, the virtual action learning facilitator may choose to use the whiteboard facility to illustrate a tool or technique that may enhance presenter or group understanding (Figure 1 illustrates a ‘SWOT’ analysis that has been typed on a WebEx whiteboard.)
Using existing electronic documents such as PDF files, the virtual action learning facilitator or group members can copy and paste images directly to whiteboard facilities. (Figure 2 depicts an image that has been copied and pasted directly from the Virtual Action Learning Guide ‘tools and techniques’ section to a WebEx whiteboard.)

The virtual action learning facilitator can also share documents directly from their PC that illustrate helpful tools and techniques to group members. (Figure 3 demonstrates Stephen Covey’s ‘Circles of Concern and Influence’ via the WebEx sharing function.)
The Virtual Action Learning Guide

Integrative Approach

Application

This approach is the basis for adult learning. The role of the set is to help the presenter explore their issue and agree an action plan. The approach uses open questioning and is based on what Carl Rogers called “unconditional positive regard” for the presenter. It requires empathetic listening and an ability to suspend judgement, and avoid advice giving or asking leading questions.

It is one of the most powerful tools in the action learning toolkit. It can be used for a wide range of issues. The technique uses an integrative approach, however the presenter is in control and is encouraged to identify the type of questioning they find the most useful.

Process

The participant presents their issue (tells their story), the other set participants listen to understand and empathise with the presenter. When the presenter has finished the set participants can ask questions for clarification and to deepen understanding. The presenter identifies what they want the set to help them with (set the agenda). This may result in further questions for clarification.

When everyone is clear on what the presenter wants the set to do the questioning begins. The presenter has a choice as to whether all the set or certain members of the set take part in the questioning. The key components of this approach are active empathetic listening and open questioning.

Active Empathetic Listening

Listening is a primary part of action learning. To do this effectively the set has to be fully present for the presenter. This means:

• Keeping your own stuff out of the way - setting aside your own preoccupations and agenda, and your own answers.
• Monitoring your own listening while the presenter is talking

(Taken from Adults Learning by Jenny Rogers pg. 192)
Listening during action learning involves what is described as Level 2 listening (Kimsey-House et al, 2011). This level of listening needs practice. It involves concentration on the presenter and their issue, listening to what and how they say as well as being aware of their non-verbal language. Empathetic listening requires the participants to get some insights into what life would be like if they were inside the presenter’s head.

**Open questioning**

Open questions are key to helping the presenter explore their own issues. They usually start with “What, How, Where, When, Who and Why, Tell me more about… So what do you need to do…?”

**Examples of open questions:**

- What do you really want?
- What have you tried in the way of resolving it?
- What/How have you contributed to the problem?
- What will happen if you do nothing?
- What’s your responsibility to change here?
- So what do you need to do to make the change?
- Who do you need to involve?
- What will support you?
- What can you do here?
- How can you change the way you respond to him or her?
- What other choices do you have?
- In what ways are you giving people the power to make these choices for you?
- How will you make these changes? - By when?
- What do you need to do to make sure you don’t succeed here?

(The use of Why?)

Why is a powerful question. It has its uses in all elements of action learning. It can be interpreted as a confrontational question. This may result in the presenter becoming defensive and rationalising their action/behaviour rather than exploring it.

**And Finally,**

It is essential that the set listen to question and answer to ensure continuity.

Initially participants may find it difficult to ask open questions and there may be a tendency to give advice or ask leading questions, which they believe, will take the participant to the “right action plan”. The role of the facilitator is to bring this to the attention of the set, to encourage the participants to focus on the presenter and continue to help them explore their own issue. It is often a good time to ask the presenter “What questions are they finding most useful”.

Many of the questions will help the presenter challenge their own assumptions and behaviour and thereby take ownership of agreed action.
The Virtual Action Learning Guide

Circle Of Concern & Of Influence

Application
Self-awareness is vital in the process of change and development. One aspect of our behaviour is our own degree of proactivity – where do we focus our time and energy, which affects the effect we have. This tool is based on Stephen Covey’s (1989) model devised as a means of identifying where our energies lie, and thus understand what needs to happen to increase our effectiveness.

Circle of Concern
We each have a wide range of concerns - our health, relationships, our children’s future, money, problems at work, the national debt, threat of nuclear war, etc. Some of these concerns we have no real control over.

Reactive people focus their attention and efforts on the issues in this circle of concern, focusing on the weaknesses of others and on circumstances over which they have no control. This is negative in nature as it results in blaming, defensiveness, reactive language and behaviour that can lead to aggressiveness or passiveness – persecutor or victim type reactions.

Those issues within the circle of concern which we can do something about are circumscribed in a smaller circle, called the Circle of Influence (below).

Proactive people focus on issues within their circle of influence, they work on things they can do something about. The nature of their energy in doing this is positive, enlarging and magnifying and so increasing their circle of influence (below left). This is adult behaviour, non-blaming and developmental. This proactive approach affects the things that we have no control over, our Circle of Concern, by enabling us to genuinely and peacefully accept those problems and issues whilst focusing our efforts on things we can affect. So we learn to live with them even if we don’t like them.

A result of being a reactive person is that those issues that are under your control and influence are neglected and under-developed, as your focus is elsewhere, and so your circle of influence shrinks (above right).

Positive change will not occur if you are working in your circle of concern.
**Process**

On a whiteboard the presenter draws a circle in which he/she depicts all the issues of concern related to that presented to the group. The group contributes by probing and questioning, thereby identifying any other underlying concerns or facts related to that issue.

The presenter can then transcribe onto a second whiteboard with the two circles (opposite) those issues that are in his/her circle of concern and those which are in his/her circle of influence.

A way of determining which circle the presenter’s concerns are in is by listening to the language used and distinguishing between the **have’s** and the **be’s**. Circle of concern is full of ‘have’s’ and the circle of influence with ‘be’s’, e.g.

<table>
<thead>
<tr>
<th><strong>Have’s</strong> (Reactive)</th>
<th><strong>Be’s</strong> (Proactive)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• I’ll be happy when I have a full establishment...</td>
<td>• I can be a better role model...</td>
</tr>
<tr>
<td>• If only I had a boss who wasn’t...</td>
<td>• I can be more organised / resourceful...</td>
</tr>
<tr>
<td>• If I had respect from...</td>
<td>• I can be more loving / understanding...</td>
</tr>
<tr>
<td>• If I had a degree...</td>
<td>• I will be more diligent...</td>
</tr>
<tr>
<td>• If I could just have management days...</td>
<td>• I can seek out personnel and be able to understand...</td>
</tr>
<tr>
<td>• If the environment was more conducive...</td>
<td><strong>This is the character focus. Proactive people are value-driven, read reality and know what’s needed recognising that change starts with them (inside-out).</strong></td>
</tr>
</tbody>
</table>

The nature of reactive people is to absolve themselves of responsibility. They focus on other’s weaknesses, the ‘them & us’ mentality.

Once visually displayed on the whiteboards exploration can take place on the steps needed to behave proactively, role-play can be used to explore proactive language and behaviour in terms of the issue presented, and an action plan is drawn up.
Z - Technique

**Application**
This technique is particularly useful in groups when the members have become bogged down or are trying to problem solve by focusing on a particular aspect of the issue. Isabel Myers, one of the authors of the *Myers Briggs Type Indicator*, developed the technique.

_Cited by Rogers, 1999_ Myers suggests that in solving any problem you need to ask four key questions. These questions form the basis of the tool.

**Process**
Participants are invited to answer **four questions** in relation to the problem they are trying to resolve.

1. **What are the facts? What are the data?**
2. **What are the possibilities? If we had no restraints what would be possible?**
3. **What are the logical implications of any choices we might make?**
4. **What is the likely impact on people of any of our choices?**

---

**Sensing**
what are the facts?

**Intuition**
what are the possibilities?

**Thinking**
what are the logical implications?

**Feeling**
what would be the impact on the people?
SWOT Analysis

Application
A classic strategic planning technique which can be used to analyse our own internal capability, and to set that in relation to what we think the environment holds for us in the future. It identifies promoters and resistors to change within four key dimensions.

SWOT stands for:
Strengths
Weaknesses
Opportunities
Threats

It’s sometimes also known as TOWS.

Process
It is usually done on a whiteboard so that the participants can see all four quadrants at once.

Each section is then completed as appropriate questions are asked to explore the individual’s (or group’s) perceptions of the environmental influences, for example:

1. For Strengths:
   - What am I good at?
   - What have I got going for me here?
   - What benefits are there in this case?

2. For Weaknesses:
   - What am I bad at?
   - What is the downside of the organisation?
   - What do I keep tripping over?

3. For Opportunities:
   - What’s around the corner that could be useful?
   - What is happening that could help me?
   - What is new, and is it good for me?

4. For Threats:
   - What could be a threat to our success?
   - What’s new and is it bad for us?
   - Who is out to get us, and are they any good?

By the close of the SWOT the group should be at the stage where it can move on to considering:

- How can we maximise and extend the strengths we identified?
- How can we minimise or overcome the weaknesses?
- How can we grab and make use of the opportunities?
- How can we avoid the threats or counter their effects?

Source: Businessballs
Pest Analysis

Application
Another classic strategic planning technique which provides a useful framework for analysing the environmental pressures on a team or organisation. Particularly useful in groups who have become too inward-looking and in danger of forgetting the power and effect of external pressures for change as opposed to internal ones.

PEST stands for:
Political / Legal
Economic
Social
Technical

It’s sometimes known as STEP or PETS.

Process
This technique can be used as a whole or small group activity. Use a whiteboard so that all can visualise the data generated.

Stage 1
Ask the group to look at Political pressures for change in their organisation and write on whiteboard. Do the same for Economic pressures / Social changes / Technological changes.

Stage 2
Ask the group to consider the implications of each of these for their work.
**Force Field Analysis**

**Application**
This technique focuses on the driving and restraining forces acting on a situation.

Driving forces are factors that indicate instability and an openness to change. They are therefore **POSITIVE** forces for change.

Restraining forces are those which promote stability and maintain the status quo: indicating, therefore, **RESISTANCE** to change.

**Process**
Divide the whiteboard into ‘Driving Forces’, ‘Current Situation’ and ‘Restraining Forces’ as below. Summarise the problem / issue and write it on the whiteboard (current situation on example below).

Summarise a general ‘snapshot’ of a better situation and write it at the bottom of the whiteboard.

Group members are then invited to brainstorm ideas for the forces at work, which are written up on the whiteboard for all to visualise. Be as specific as possible.

The forces are then analysed by the group to determine the needs and priorities to be addressed in planning for change. This can be done through any of the following alternatives:
- Changing the strength of a force
- Changing the direction of a force
- Withdrawing hindering forces
- Adding new helping forces

There is a suggestion that change is more likely if the focus is on influencing the restraining forces, as opposed to adding new helping forces which in themselves may add more resistors to action.

*Source: Lewin*
Role Set Analysis

**Application**
This technique helps an individual to think through what is expected of them and how these expectations may conflict and cause other problems.

**Process**
The presenter (of the issue) should draw themselves in the middle of a whiteboard, and around them, draw all the individuals or groups with whom they interact to do their daily job.

Beside each identified person or group they write down what they believe this person / group wants, needs or expects from them. Also, what they want, need or expect from that person / group.

Once they have completed this, or as they are going through the process, they share their analysis. Once completed other group members can grow the discussion by questioning expectations or challenging assumptions.

It is probable that the exercise will indicate areas where there is conflict – e.g. what people expect and what can be provided or what they get.

Source: Pfeffer & Salancik
The Five Whys

**Application**
This tool can be applied to many situations, particularly a single problem event. It is a technique which focuses on getting to the root cause of the issue rather than being distracted with the symptoms.

**Process**
Pick on one of the main symptoms of the issue and ask “Why did this happen?”
Up to three or four answers may found, and for each of these the next “Why?” is asked, such as “Why is that?” The whole process is repeated five times.

### Example – Five Why’s in action

**Issue**: A ward sister feels overwhelmed with her “ever-increasing” workload.

<table>
<thead>
<tr>
<th>First answer</th>
<th>Second answer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Why?</strong> The throughput of patients has increased on my ward</td>
<td>There is so much paperwork, forms to fill in etc.</td>
</tr>
<tr>
<td><strong>2. Why?</strong> The bed manager keeps sending the patients to our ward when the beds are not yet available.</td>
<td>Everyone wants so much information.</td>
</tr>
<tr>
<td><strong>3. Why?</strong> My staff can’t say no.</td>
<td>It’s mainly facts and figures for audit purposes.</td>
</tr>
<tr>
<td><strong>4. Why?</strong> They feel pressured into it by the bed manager.</td>
<td>I am not sure what it’s used for really. No feedback has ever been given.</td>
</tr>
<tr>
<td><strong>5. Why?</strong> They are not assertive enough. Perhaps they’d benefit from some training in this area.</td>
<td>No one has ever questioned them. Perhaps if I did, I would find they do not serve any useful purpose, or suggest another way of getting the information.</td>
</tr>
</tbody>
</table>

*Source: Ohno*
**Six Honest Serving Men**

**Application**
This technique is very useful for issues that require all the information to be identified and a way forward agreed, for example in developing a strategy or plan. The title comes from the first verse of the following poem by Rudyard Kipling and is useful as an aide memoir.

I keep six honest serving-men (They taught me all I knew);
Their names are What and Why and When And How and Where and Who.
I send them over land and sea, I send them east and west;
But after they have worked for me, I give them all a rest.

*Rudyard Kipling*

following the story “Elephant’s Child” in “Just So Stories”

**Process**
The easiest way to use this technique in action learning is to ask clarifying questions until the problem or issue is specifically identified then use a mind mapping technique shown opposite.

The advantages to this approach are that it encourages open questioning. The individual can do it with prompts from the group or as general brainstorm. It can be a useful if the presenter is having trouble identifying what they know or understand about an issue or if it is very emotive. The ‘how’ can lead to an action plan depending on what the issue or problem is.
Appreciative Inquiry

Application
An Appreciative Inquiry is a way of working with people who have similar concerns or interests to you in order to:

- Understand your problems and develop new and creative ways of looking at issues
- Appreciate and value the best of what you have got and then help to make it even better.

The inquiry moves through:

- Appreciating and valuing the best of ‘what is’
- Envisioning ‘what might be’
- Discussing ‘what should be’
- Innovating ‘what will be’

Process
An Appreciative Inquiry on team building may be:

- Describe a time when you thought the team functioned well. What were the circumstances during that time?
- Describe a time when you were proud to be a member of that team. Why were you proud?
- What do you value most about being a member of this team? Why?
- What gives ‘life’ to this team?
- Describe an incident when you or someone else went the extra mile to provide a participant / client with what they wanted and when they wanted it. What made that possible?

This is designed to reflect the best experiences, values, life-giving force, hopes and priorities. This enables participants to take the best of the past (known) into the future (unknown) and provides rich experimental and contextual data from which to identify binding themes and to collectively imagine new and exciting possibilities.

Dream Phase (imagining what might be)
Participants are asked to envision results and engage in further search. Information from the Discover Phase is used as a platform to speculate on possible or desired futures. Participants may self-select dependent on their interest and expertise. Key themes are transferred into statements of strategic and social intent. Positive propositions, which excite, stretch and guide participants toward a preferred future. The beauty in this process lies in the connections people see and express in where they want to go taking what they really value with them.

Design Phase (co-constructing what should be)
Participants co-construct a new reality based on the dream phase – (direction, principles, strategic framework). Questions relate to what would be ideal, how we can make it work and what conceptual, behaviour, operational changes we need to make. (Project team develops from here for organisational inquiries).

Deliver Phase (sustaining, learning, adjusting)
Affirmation of achievements.

The potency of the approach lies in the frame of positive inquiry and the realisation that change and inquiry are simultaneous.

Source: Cooperrider et al
The Three Brains

Application

• Your Brain does the analytical thinking
• Your Gut reaction tells you if you are on the right track
• Your Heart confirms that you have done the right thing at the right time

The idea is taken from:
‘The other 90% - how to unlock your vast untapped potential for leadership and life’. Written by Robert K. Cooper.

The article refers to the work carried out by the creative leadership centre, which concluded that the only statistically significant factor differentiating the very best leaders from mediocre ones is ‘caring’.

Process

No real process involved with this, just something very short and simple to make you stop and think before taking action. Some suggestions of techniques used are:

Ask the presenter to write the headings on a whiteboard and brainstorm each section considering all aspects of the issue from that ‘angle’. The rest of the set facilitates this thinking by using open questioning.

Draw mind maps from each of the brains: the individual can then be assisted to explore the issue under each section. They can then also receive feedback from the group on their body language when they were in each brain mode, indicating a preference or difficulty.
Brainstorming or ‘Thought Showers’

**Application**
Brainstorming is a useful tool to broaden thinking, identify possibilities. The essence of brainstorming is that any idea, however silly is encouraged in the first stage.

**Process**

**Stage 1**
- Any idea however ridiculous or outrageous is permitted
- All ideas are jotted down (agree who will do this - It is important that the person does not edit what is said or act as a filter)
- As facilitator your role is to offer as many funny, absurd sensible and practical ideas as the rest of the set
- No evaluation of ideas is permitted in the first stage - e.g. no judgements either verbal or non-verbal.

This stage goes on until all the ideas are exhausted

**Stage 2**
- Agree criteria for evaluating the ideas - e.g. how will you judge whether any of these ideas are useful or not?
- Look for several criteria - e.g. cost, practicality, speed etc

This stage goes on until all the ideas are exhausted

**Stage 3**
- The presenter of the issue - not the rest of the set or the facilitator, evaluates ideas.

**Stage 4**
- The ideas are turned into action.

Source: Osborn
Mind Mapping

Application
Mind mapping is a technique developed by Tony and Barry Buzan. The basic premise of mind mapping is to encourage “Radiant Thinking and in so doing to raise significantly the standard of intellectual skills and intelligence”. The use of mind mapping in action learning can be to support other techniques such as Thinking Hats/Shoes etc as it encourages the presenter to develop their thinking in a wider and more lateral context. It is also useful for note taking during action learning as it captures the interpretation of the essence of what is being presented. It can also be used in self-awareness and problem solving.

Process

Buzan defines mind mapping as:

“An expression of Radiant Thinking and is therefore a natural function of the human brain. It is a powerful graphic technique which provides a universal key to unlocking the potential of the brain. It can be applied to every aspect of life where improved learning and clearer thinking will enhance human performance. The Mind map has four essential characteristics:

a) The subject of attention is crystallised in a central image
b) The main themes of the subject radiate from the central image as branches
c) Branches comprise of a key image or key word printed on an associated line. Topics of lesser importance are also represented as branches attached to higher level branches.
d) The branches form a connected nodal structure.”

Mind maps are enhanced by colour and imagery. These aid creativity, memory and specifically recall of information.

Opposite, is an example of a mind map using ‘Happiness exercise’, taken from “The Mind Map Book”. This example is useful in helping participants understand the use of mind mapping and its use in mapping patient stories. It is also helpful in teasing out a complex issue and enables other members of the set to gain a better understanding of the issue.

Using mind mapping approach a natural progression would be to build on the key words and develop the map further.

This process can continue till words begin to repeat themselves or form natural links to other branches of the map.
Issues and Feelings

Application
This technique draws heavily on the work of Senge (1990) and Argyris & Schon (1978) in relation to reflection. Our ‘mental models’ - images, assumptions, stories from personal experiences - influence our feelings and these in turn affect our behaviour.

“Our mental models determine not only how we make sense of the world, but how we take action.”

(Senge 1990)

The purpose of this model is to separate the issue from the feelings attached to it.

Process
It has more impact if the issue is identified on a whiteboard so that the presenter has the visual focus as well as the mental picture without the attachment of feelings. This will require questioning by the set members to enable the presenter to identify the issue alone and not their feelings about the issue.

Once the issue has been identified the group can work with the presenter to enable him / her to develop an action plan.

The feelings which were identified can also be worked on as there is potential for these “mental models” to continue to affect the presenter’s action / reaction to similar situations.

Example:

My manager doesn’t think I’m credible enough to do my job well as she avoids discussion with me and always cancels our meetings. It’s obvious that she doesn’t value me.

becomes

There is a communication problem between my manager and myself.
The Virtual Action Learning Guide

Concept Analysis

Application
Within action learning concept analysis can be used as a tool to understand an issue and explore it in more detail. Mores (1995) defines concept analysis as a research approach to clarify and delineate phenomena so that they can be studied in greater depth. This approach can help an individual or a group to clarify issues and focus their efforts in a more organised way.

Process
Concept analysis uses a three-way approach by exploring the:

1. **ANTECEDENTS:**
   What needs to be in place to make it happen

2. **ATTRIBUTES:**
   What are the characteristics

3. **CONSEQUENCES:**
   What would the outcomes be both positive and negative.

The facilitator of the issue can break the group up into two's or three's to brainstorm each element of concept analysis and then feed back to the whole group.

If the action learning set is small the facilitator may do this process as a group. In either case a great deal of discussion amongst the group will occur and contribute to an action plan to take the issue forward.

Examples of how Concept Analysis can be used:

- To review a word: i.e. leadership, risk management, clinical governance and strategy.

- To explore an issue or situation in clinical practice like the off duty or poor performance, team building or models of care.

- To action occurring themes from an organisation, ward, clinic or department. For example from patient stories or observations of care i.e. communication, patient information, pain relief.
Power Outcomes

**P**ositive
Ask: “What would you rather have?”

**O**wn part
Ask: “Is this within your own control?”
Which bit of this is within your own control?

**W**hat, specifically?
Ask: “What specifically do you want? With whom? Where do you want to achieve this? By when?”

**E**cology
Ask: “If you could have that tomorrow, would you take it?”
If you get hesitation:
Ask: “What stops you?”

**R**eal
Ask: “Can you imagine now how it will be when you have achieved your outcome? Imagine what you see and hear, how you will feel…”

Sources: New Oceans (2003) and Tosey (2011)
**Imagineering (Disney Strategy)**

Three physically different positions for three different ways of thinking.

**Problem Solving: Disney Strategy**

This activity is based on the way in which Walt Disney was said to use different rooms within his house to think differently. The exercise encourages you to literally place yourself in a different frame of mind.

‘Think yourself’ into each of the perspectives. Consider how you would behave, what would be your view of the issue in front of you, how you would express your thoughts.

<table>
<thead>
<tr>
<th></th>
<th>Creative</th>
<th>Critic</th>
<th>Realist</th>
</tr>
</thead>
<tbody>
<tr>
<td>sees possibilities</td>
<td>sees possibilities</td>
<td>sees problems</td>
<td>sees solutions</td>
</tr>
<tr>
<td>excited</td>
<td>excited</td>
<td>serious</td>
<td>calm</td>
</tr>
<tr>
<td>enthusiastic</td>
<td>enthusiastic</td>
<td>dispassionate</td>
<td>pragmatic</td>
</tr>
<tr>
<td>sees the best in a situation</td>
<td>sees the best in a situation</td>
<td>sees what could go wrong</td>
<td>sees both sides</td>
</tr>
<tr>
<td>can do anything</td>
<td>can do anything</td>
<td>sets boundaries restricted by beliefs</td>
<td>plans for success</td>
</tr>
<tr>
<td>risk taker</td>
<td>risk taker</td>
<td>risk averse</td>
<td>contingency plans</td>
</tr>
<tr>
<td>challenges status quo</td>
<td>challenges status quo</td>
<td>maintains status quo</td>
<td>evolves status quo</td>
</tr>
<tr>
<td>undaunted by failure</td>
<td>undaunted by failure</td>
<td>motivated to avoid failure</td>
<td>welcomes feedback</td>
</tr>
<tr>
<td>keeps trying</td>
<td>keeps trying</td>
<td>downside planning</td>
<td>flexible</td>
</tr>
<tr>
<td>light</td>
<td>light</td>
<td>steady</td>
<td>balanced</td>
</tr>
</tbody>
</table>

*Source: Imagineers (1996)*
Imagineering (Disney Strategy)

1. Decide on the topic/issue/problem to be discussed.

2. Whilst you are in the creative position, talk positively about the topic/issue/problem, keep coming up with idea after idea after idea, unrestrained by reality. Take notes, actively listen to everything and give support by interjecting comments or questions which will continue to generate and encourage creativity. However, no challenges, resistance or practical objections/suggestions.

3. Next, move to the critic position and talk about the downside of the issue. Critic focuses on all the challenges, everything that can go wrong, why it won’t work etc. Again, no arguments, actively listen to each of the points raised, consider all the downsides and the possible obstacles.

4. Finally, move to realist. The question facing Realist is “what would need to happen (given the problems raised) in order for these ideas to work?”. If we were to do this, this and this, then this would happen. Raise plans, strategies and processes that would enable a creative solution.

5. Now move out of these positions, review the outcome of the process and select an appropriate plan of action. If necessary, the process can be repeated a number of times, rotating through each of the positions as desired.

Source: Imagineers (1996)
### Content Free Questions

The **capital letters** in most questions are there to assist the facilitator while asking their question and to know where to place the emphasis.

<table>
<thead>
<tr>
<th>Q1</th>
<th>What’s the issue?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q2</td>
<td>What makes it an issue <strong>NOW</strong>?</td>
</tr>
<tr>
<td>Q3</td>
<td>Who <strong>OWNS</strong> this issue/problem?</td>
</tr>
<tr>
<td>Q4</td>
<td>How <strong>IMPORTANT</strong> is it on a 1-10 scale? Where 1 is least important and 10 is most important.</td>
</tr>
<tr>
<td>Q5</td>
<td>How much <strong>ENERGY</strong> do you have for a solution on a 1-10 scale? Where 1 is least energy and 10 is most energy.</td>
</tr>
<tr>
<td>Q6</td>
<td>What have you <strong>ALREADY TRIED</strong>?</td>
</tr>
<tr>
<td>Q7</td>
<td>Imagine this problem has been solved. How would you <strong>EXPERIENCE</strong> it? (see? hear? feel?)</td>
</tr>
<tr>
<td>Q8</td>
<td>What’s <strong>STANDING IN THE WAY</strong> of that ideal outcome?</td>
</tr>
<tr>
<td>Q9</td>
<td>What’s your <strong>OWN RESPONSIBILITY</strong> for what’s happening?</td>
</tr>
<tr>
<td>Q10</td>
<td>What <strong>EARLY SIGNS</strong> are there that things might be getting better? When’s it not there, not so bad, not so persistent?</td>
</tr>
<tr>
<td>Q11</td>
<td>Imagine you’re at your <strong>MOST RESOURCEFUL</strong>. What do you say to yourself about this issue?</td>
</tr>
<tr>
<td>Q12</td>
<td>What are the <strong>OPTIONS</strong> for action here?</td>
</tr>
<tr>
<td>Q13</td>
<td>What <strong>CRITERIA</strong> will you use to judge the options?</td>
</tr>
<tr>
<td>Q14</td>
<td>Which <strong>OPTION</strong> seems the <strong>BEST</strong> one against those criteria?</td>
</tr>
<tr>
<td>Q15</td>
<td>So, what’s the <strong>NEXT</strong> first small <strong>STEP</strong>?</td>
</tr>
<tr>
<td>Q16</td>
<td><strong>WHEN WILL YOU TAKE IT?</strong></td>
</tr>
</tbody>
</table>

**Source:** Marquardt (2005)
### Six Category Intervention Analysis (Types of Intervention)

John Heron (1999), a humanistic psychologist, developed a simple but comprehensive model of the six types of intervention a facilitator could use with group members:

<table>
<thead>
<tr>
<th>1</th>
<th>Prescriptive</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Informative</td>
</tr>
<tr>
<td>3</td>
<td>Confronting</td>
</tr>
<tr>
<td>4</td>
<td>Cathartic</td>
</tr>
<tr>
<td>5</td>
<td>Catalytic</td>
</tr>
<tr>
<td>6</td>
<td>Supportive</td>
</tr>
</tbody>
</table>

(Heron: Six Category Intervention Analysis 1975 University of Surrey)

Heron also developed an analysis of the modes of facilitation (with particular regard to small groups), classifying these as:

| Hierarchical | Co-operative | Autonomous |

Some groups will evolve through these modes in sequence, but things are not necessarily that simple! It can be helpful to consider what mode is operating at any given time.

These ideas can be seen as a framework to understand the types of facilitation that can be made in a range of contexts. In the table below, the six categories of intervention are re-written as follows:

| Prescriptive | = | Planning |
| Informative | = | Meaning |
| Confronting | = | Confronting |
| Cathartic | = | Feeling |
| Catalytic | = | Structuring |
| Supportive | = | Valuing |

### Dimensions

**PLANNING:** To do with the *Programme and learning objectives* also include Assessment and the Evaluation of Course/Facilitator

*Dilemma* “Need to guide people to freedom”.

**MEANING:** To do with *making sense of*, and *understanding* what’s going on in the learning group, in the three areas of:

- **The task**
- **The process of the group**
- **The learning process**

**CONFRONTING:** Raising awareness about blocks to learning in the group.

Anxieties, Ignorance, Limited learning Objectives, Cultural oppression, “Easy Street”

The issue being avoided, the behaviour to do this and the source of the behaviour

“Tell the truth with love and not moralistic judgment, oppression or nagging”.

Don’t Pussify or Sledgehammer.

**FEELING:** The *management of feelings* i.e. the emotional life of the group.

You aim to *identify negative emotional processes*, *interrupt them and change to positive emotional process*.

By acknowledging that positive and negative are always present you are concerned with getting the *balance right*.

**STRUCTURING:** To do with structuring of learning experiences:

The *environment and methods*.

Also the *supervision of these*.

There is “Here and Now” part of planning a course, i.e. *details of the course design*.

**VALUING:** To do with creating a *climate of respect* for people.

Members feel valued and honoured.

### Hierarchical Mode

You plan the whole programme, including:

- **Time**
- **Topics**
- **Resources**
- **Methods**

May consult group but not negotiate.

You input the theory i.e. the concepts & images.

You interpret, and

You assess what’s going on.

You interrupt things and interpret for the group.

You decide how the group will manage feelings you think for the group and decide on action e.g. switching dynamics with games, exercises, ceremonies for opening and closing.

You give permission for catharsis.

You take responsibility for design and supervision of exercises.

**Pre-course** you organise programme, rooms, resources, fee, group composition.

You set the *ground rules*, purpose of exercise and review them yourself.

Your actions and commitment to valuing people direct the group.

You decide *ground rules* that support this, and have positive regard for people.

You are actively charismatic i.e. exhibit “distress-free” authority.

Very important in early stages of a group.
<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Co-operative Mode</th>
<th>Autonomous Mode</th>
</tr>
</thead>
</table>
| **PLANNING**: To do with the *Programme and learning objectives* also include Assessment and the Evaluation of Course/Facilitator | You negotiate and co-ordinate the learning contract. You may present your programme and ask for their views or … May ask the group to provide programme for discussion. | You delegate to the group. May operate as a peer, or a facilitator or even NOT AT ALL if they ask you to leave. 
*N.B.: The dilemma:* 
"Need to guide people to freedom". |
| **MEANING**: To do with making sense of, and understanding what's going on in the learning group, in the three areas of:  
• The task  
• The process of the group  
• The learning process | You ask neutral open questions to stimulate the group e.g.: “What is happening now?” You describe events without interpretation. You collaborate and negotiate an assessment. | You allow members of the group to reflect and reach understanding themselves. May delegate this to a group member. |
| **CONFRONTING**: Raising awareness about blocks to learning in the group. Anxieties, Ignorance, Limited learning Objectives, “Easy Street” The issue being avoided, the behaviour to do this and the source of the behaviour “Tell the truth with love not moralistic judgment, oppression or nagging”. Don’t PUSSYFOOT or SLEDGEHAMMER. | You ask for views from group on their avoidance of:  
• Issue  
• Behaviour  
• Source May describe events. | You provide a safe, supporting and trusting environment to allow the group to confront for itself. May delegate the confronting role e.g. have a “devil’s advocate” rule. |
| **FEELING**: The management of feelings i.e. the emotional life of the group. You aim to identify negative emotional processes, interrupt them and change to positive emotional process. By acknowledging that positive and negative are always present you are concerned with getting the balance right. | You work with the group on different ways of managing feeling. e.g. by getting the view of the members and then negotiating changes, new methods etc. You may work 1 : 1 with a member rather like a counsellor. | You give the group space to manage its own feeling. e.g. by working in pairs/trios. You may delegate this to a member in turn. |
| **STRUCTURING**: To do with structuring of learning experiences:  
The environment and methods.  
Also the supervision of these. There is “Here and Now” part of planning a course, i.e. details of the course design. | You co-operate with the group on ground rules, exercises and review of things. You use a range of skills here akin to counselling and consulting. | You give space to the group to devise and manage its own learning. You delegate design, choice and review to the group. You may become a peer member or even leave the group. |
| **VALUING**: To do with creating a climate of respect for people. Members feel valued and honoured. | You collaborate with members as they develop, respecting self-determination. You give the choice of doing something or not. You collaborate with the group to create a favourable climate. By co-operating with the other 5 dimensions, you are valuing people. | You create space for the group to exercise autonomy and self-determination. You may delegate facilitation to a member. Make self-disclosures about your beliefs, attitudes, feelings, anxieties and delights. |

Sources: Heron (1975) and Heron (1999)
G.R.O.W. Model - John Whitmore

This is probably one of the best known and most widely used approaches to coaching. It also provides a useful framework for coaching within an Action Learning set.

GROW = Goal, Reality, Options, Will

G = Goal
Setting goals for the learning project in general, or for this particular coaching session:

- What exactly do you want to achieve (short/long term)?
- Is any part of it measurable?
- How will you know if you reach your goal?
- By when do you want to achieve it?
- How much of this is within your own control?
- Is the goal positive, desirable, challenging, achievable for you?
- How would you rate your achievements so far, in this respect?
- Do you want to break down the overall goal into more manageable sub-goals?

R = Reality
Testing and raising awareness of the situation right now:

- Why haven’t you reached this goal already?
- What actions have you already taken (if any) to try to reach this goal?
- What have you learnt from that?
- Who else do you need in order for you to reach this goal?
- Who else will be affected if you reach this goal?
- Will there be ‘winners’ and ‘losers’?
- Do you know anybody else who seems to be successful in achieving this sort of goal?
- If so, what can you learn from them?
- What constraints inside yourself are holding you back from this goal?
- What constraints outside yourself are holding you back from this goal?
- How might you overcome these?
- What is really stopping you?
- What might you do to sabotage your own efforts to reach this goal?
O = Options
Finding alternative strategies, solutions, answers:

- What could you do as the next step (or perhaps the first step) to meeting your goal?
- What else could you do? And what else? (keep repeating this!)
- If time was not a factor - what could you do?
- If resources were not a factor - what could you do?
- If there was no ‘history’ and no ‘politics’ - what could you do?
- What would happen if you did nothing?
- Is there anybody whom you admire or respect who does this really well? What do they do which you could try?

W = Will
Testing your commitment to your goal, making concrete, realistic plans to reach it:

- Where does this goal fit in your personal priorities in your life at present?
- Do you have other priorities which will take your energy and motivation?
- Which of all the options will you choose? (Maybe several).
- How will that help you to achieve your goal?
- Who else needs to know about your plan? How will you inform them?
- What obstacles do you expect to meet? How will you overcome them?
- How would you score your own level of commitment to achieving this goal, on a scale of 0 to 10? (0 being “absolutely not!” and 10 being “totally committed!”)
- If your commitment score is less than 8 - will you actually get started? Would it not be better to drop the idea and find something which you really want? Do you need to feel guilty if you drop it? Should you break it down into smaller steps?

In using this model, the order is not as important as a fully rounded discussion. This will normally mean that all four areas (letters) are covered.

Source: Whitmore
Virtual Action Learning
References & further reading

“The illiterate of the twenty first century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn.”

Alvin Toffler

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Covey, S. (1989) The Seven Habits of Highly Effective People


Heron, J. (1975) Six Category Intervention Analysis University of Surrey


Kipling, R. (1902) Just So Stories


If any source has been overlooked, NLIAH would be pleased to address this in future editions.