Sergent Results Group

CQI Learning Lunch

Training vs. Learning

Why Performance Requires Learning

Host - Dennis Sergent

517-381-5330

September 6th, 2011

10:30 AM to 1:00 PM

University Club of Michigan State

3435 Forest Road, Lansing, MI 48909

517-353-5111

Sponsoring Organizations

The Learning Challenge

- Only 15% of Performance Improvement Comes From Training
  - The rest comes from the hard work of using the learning already known by the learners
  - Learning by doing something with the knowledge and testing the results
  - Consulting to do things differently, to do new things or to not do some things at all
- Only 21% of Training Value Comes from Teachers or Instructors
  - About 80% comes from the learner doing
  - Value ($) difference from active learning examples abound
- 53% of Projects Fail
  - With certified project managers
  - There are models of higher performance
- 65% of Transformation Projects Fail
  - Because people, brand and culture are ignored in favor of technology
  - Defensive reasoning can be addressed, but it takes time
- Only 9% of Communication Depends On Words
  - Non-verbal communication accounts for 90+% of communications
  - We can unlock what is NOT said today
  - Competent facilitators are essential

A History of Learning

- Analysis - How the Parts Work
- Synthesis - Why the System Works Better Than the Parts
- Banking Model – Versus Dialogue Model of Learning
- Ackoff, Deming, Langford, http://www.youtube.com/watch?v=2MJ3lGJ4OFo&feature=related
- Russ Ackoff – Turning Learning Upside Down
- Dave Meier – Accelerated Learning
- Stephen R. Covey – Seven Habits
- System of Profound Knowledge – Deming & Many Others
- David Langford – Quality Learning Systems
- Chris Argyris – Double Loop Learning & Skilled Incompetence in "Overcoming Organizational Defenses" & "Teaching Smart People How to Learn"

What Is "Old Way" Thinking?

- **Fear Based Education & Transition**
  - Knowledge only comes from an authority
    - And delivered "to" a student
  - "Driving Change" – and "Teaching Them" with "the right answer"
  - Reliance on Reforming & Restructuring
  - Reducing Variation, Cost, Waste, Inventory, etc
  - Talk about "Working Together"
  - Striving for "Zero Defects" and "Zero Waste"
  - Continuous Improvement of Measurement Systems
  - One Tool For Transformation
    - Benchmarking, PMP, Reengineering, TQM, Six-Sigma, etc.
  - Using Metrics for Alignment*

* Without a transformation of our thinking

Banking Model vs. Dialogue Model

Banking MODEL

- Information Processing Context

DIALOGUE MODEL

- Active Learning Context

OLD FRAMEWORK

1. Argument
2. Logic - Affirmative / Negative
3. Evidence
4. Impact

NEW FRAMEWORK

1. Identity
2. Purpose
3. Method
4. Adaptation

HOW LEARNING IS DIFFERENT

- Banking Model* of Learning
- Reading At Speed to Memorize
- Repeating Back At Rote, Incomprehensible Speeds
- Quote Expert Ideas & Authors
- Overwhelm "Opponents" with Preponderance of Evidence
- Contradict Opponents
- Win / Lose Proposition

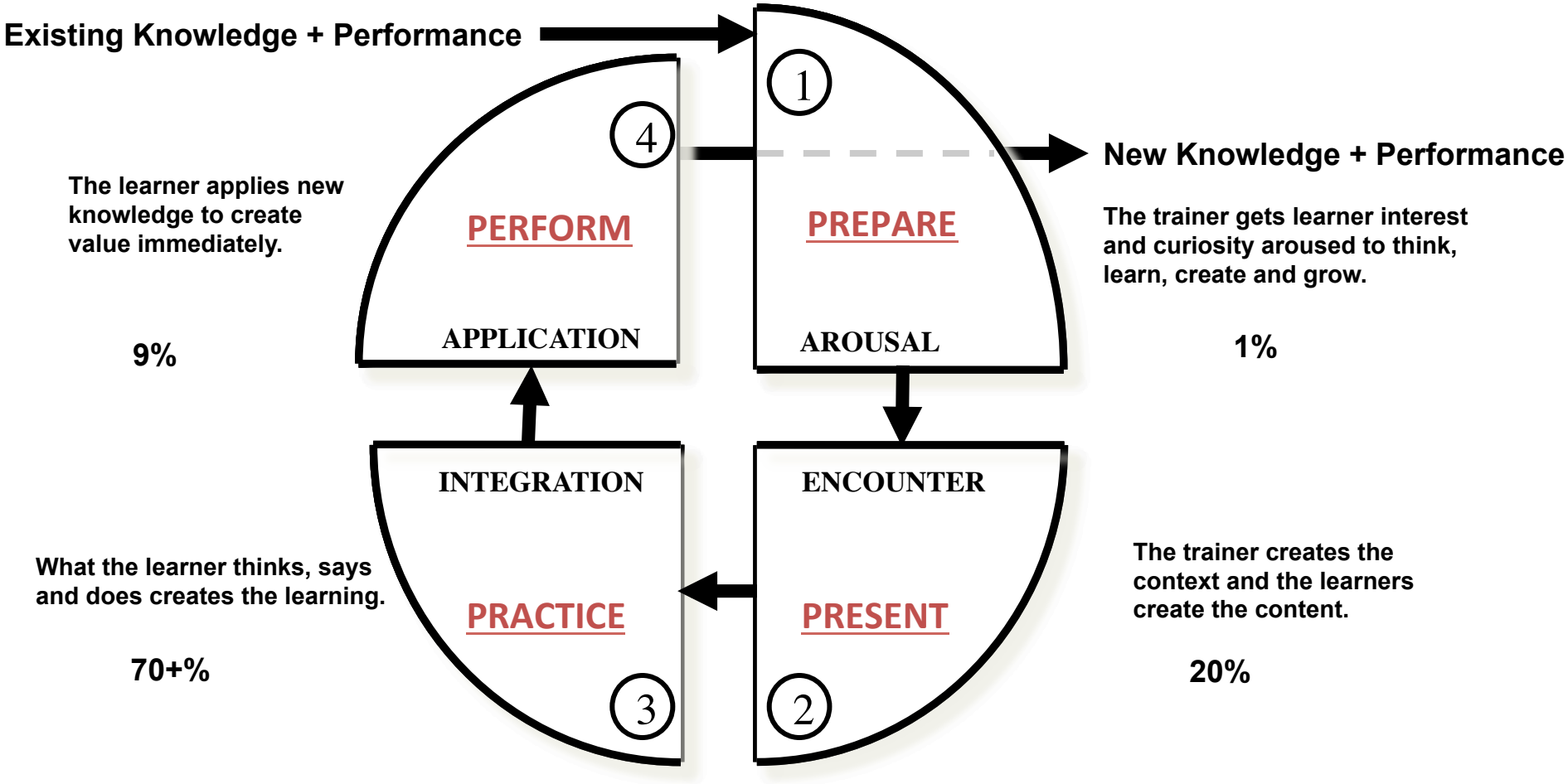
HOW LEARNING IS DIFFERENT

- Pursue Active Learning
- Challenge Thinking in Ideas
- Pose Questions In Dialogue
- Define Adaptation We Must Make
- Win / Win Proposition

*** Banking Method as described by Paolo Friere and HBO Documentary "Resolved" about the innovative approach of a coach and two students in the debate competitions of 2006 and 2007.**

Four Phase Learning Cycle

→ Learning is most effective when learners are involved at physical, auditory, visual and intellectual levels.



→ Learning is the creation of meaning, knowledge and actionable value by the mind of the learner.

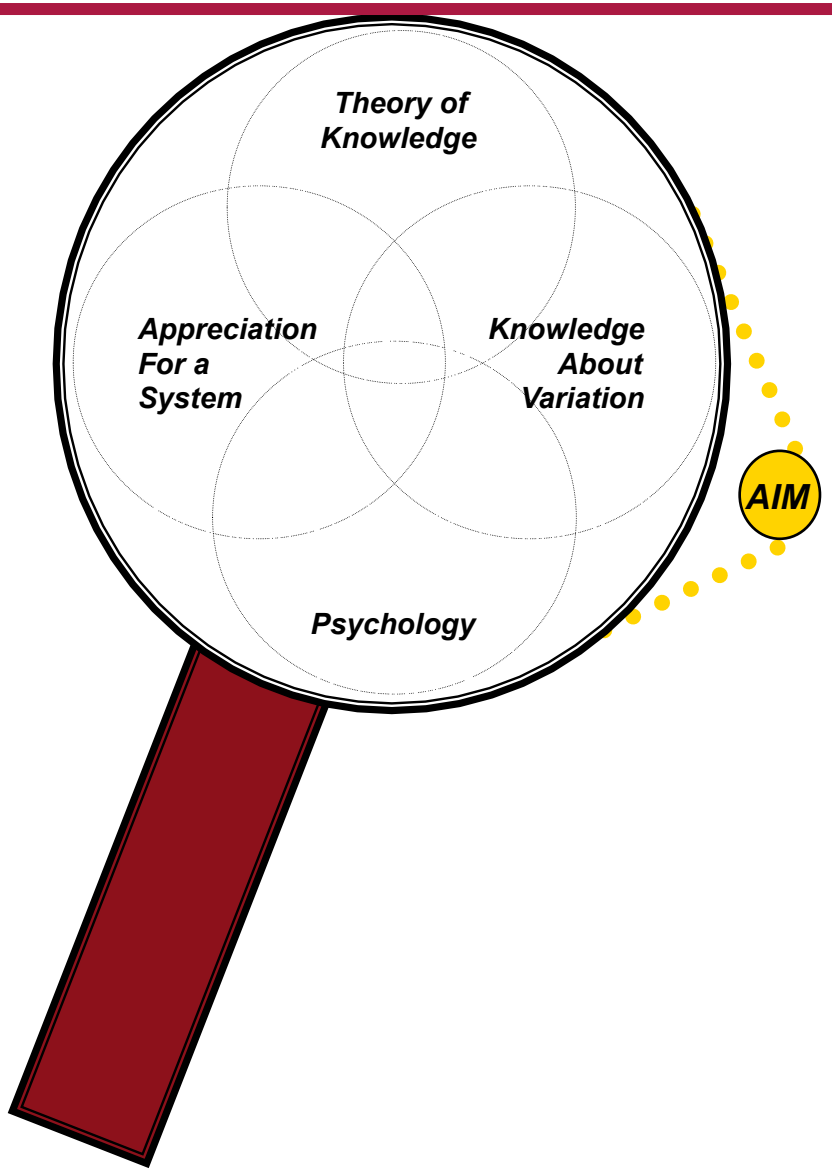
*see David Meier "Accelerated Learning Handbook"

David Langford's Points For Quality Learning

1. Plan strategies with people instead of for people.
2. Start teaching learners how to asses their own work and progress.
3. Form teams out of improvement needs, but not of the need to form teams.
4. Only give a test to find out what to do next.
5. Take the names off tests and chart results to measure the system's performance, not the individual's performance.
6. The size of a team depends on the complexity of the problem or opportunity for improvement.
7. Take action to improve. Avoid the practice of giving only lip service to quality improvement.
8. Understand that you are at the top of your system and CEO of "Me Inc.".
9. Reduce waste in learning by minimizing the loss of human potential.
10. Focus on improved, documented learning, not on improved rankings and ratings.
11. Trust the process of improvement PDSA (Plan-Do-Study-Act).
12. Reduce dependency on testing and textbooks to achieve quality in learning. Rely instead upon improving the processes of the learning experience.
13. Create methods to encourage and track lifelong learning.
14. Focus on the system/process, not on the individual.
15. Understand that people do not resist change; they resist being changed.
16. Go upstream in the process to prevent poor quality.
17. Improve systems by first improving the largest system over which you have influence, then modify the containing systems to produce even greater results.
18. Understand what to improve in relation to the purpose and vision of the organization.
19. Understand the leadership role of the facilitator.
20. Understand the colleague and society relationships.

System of Profound Knowledge (SoPK) * W.E.Deming

- **"The aim . . . is to provide an outside view - a lens . . . provides a map of theory by which to understand the organizations that we work in"**
- Components of The Whole
  - **Theory of Knowledge**
    - **Knowledge is built on theory**
  - **Appreciation for a System (*the Enterprise)***
    - **A system is a network of interdependent components that work together to accomplish the aim of the system**
  - **Knowledge About Variation**
    - **There will always be variation…..**
  - **Psychology**
    - **Individuals**
    - **Groups**
    - **Society**
    - **Change**
- **"One need not be eminent in any part of profound knowledge in order to understand and to apply it"**
- **"The various segments of the system . . . Cannot be separated. They interact with each other. For example knowledge about psychology is incomplete without knowledge of variation."**
- It is NOT the flavor of the week!



SERGENT RESULTS GROUP

System of Profound Knowledge - Components

TIMELINE of PROFOUND KNOWLEDGE - IMPORTANT CONCEPTS & SOURCES

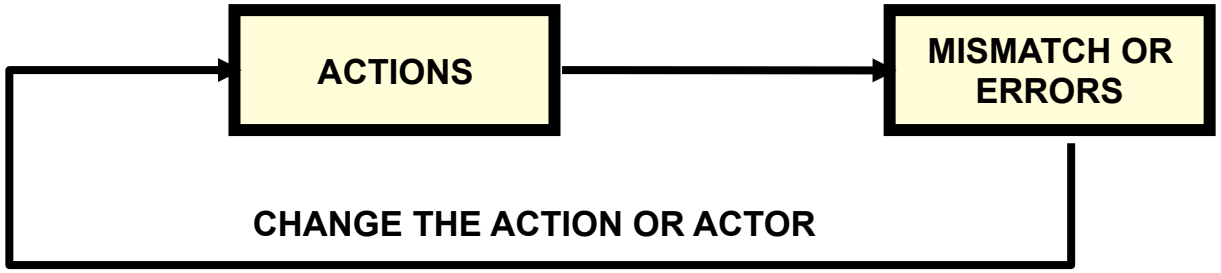
	1900s	1910s	1920s	1930s	1940s	1950s	1960s	1970s	1980s	1990s	2000s	2010s
KNOWLEDGE	Realism of Pragmatism, John Dewey - 1905		Mind & World Order, C.I. Lewis - 1929	How We Think, John Dewey - 1933			Experiential Learning Theory, Carl Rogers - 1969	Double Loop Learning in Organizations, Chris Argyris - 1974			Descriptive & Normative Learning Models, Carlile & Christensen - 2005	
								Adult Learning Theory, Malcolm Knowles - 1975			The Accelerated Learning Handbook, Dave Meier - 2000	
PSYCHOLOGY			Lewin's Equation, Kurt Lewin - 1920	Anthropological Theories Applied to Business, Edward Tolman - 1932		Organizational Development, D. McGregor - 1950	Human Side of Enterprise, D. McGregor - 1960	Relationship Awareness Theory, Elias Porter - 1971	Diffusion of Innovation, Everett Rogers	Organizational Defenses, Skilled Incompetence, Management Malpractice - Chris Argyris - 1991		Autonomy, Purpose, Opportunity to Develop Mastery - Daniel Pink - 2007
			Participation Management, Mary Parker Follett - 1925			Socio-Technical System, Eric Trist, Tavistock Institute - 1951	Maslow's Hierarchy of Needs, A. Maslow - 1962	Attribution Error, Lee Ross - 1977				
			Hawthorne Experiments, Elton Mayo - 1927				Motivation Theory, Herzberg - 1968					
SYSTEMS			Scientific Management, F. Taylor, Frank & Lillian Gilbreth - 1920s		General Systems Theory, Ludwig von Bertalanffy - 1949	Holistic Management, Stafford Beer - 1959	Principles of Systems, Jay Forrester - 1968	Human Performance - Gearry Rummler -	Creating The Corporate Future, Russ Ackoff - 1981	Improving Performance: G.A. Rummler & A.P.Brache - 1998		
									Open Systems, Fred Emery	Fifth Discipline, Peter Senge - 1990		
									The Goal, Eli Goldratt - 1984	Theory of Constraints, Eli Goldratt - 1990		
VARIATION			Shewhart Control Chart, W. Shewhart - 1924	Economic Control of Quality of Manufactured Product, W. Shewhart - 1931	Use of Statistical Methods to Support The War Effort 1941 to 1945		Enumerative vs. Analytic Studies, W. E. Deming 1960		Systems Renewal - Reliability Fundamentals, V. M. Catuneanu & A.N. Mihalache -			
			Design of Experiments, Sir Ronald Fisher - 1925	Statistical Method From the Viewpoint of Quality Control, W. Shewhart - 1939								
				Sampling Methods Developed, H. F. Dodge								

What We Can Do Differently

- **Use The PDSA/PDCA Model As A Foundation**
  - **Plan - Do - Study - Act**
  - **To Ensure We Really Need Training**
  - **Analyze Performance Based on The System Needing Improvement**
- **Use the ADDIE Model Next**
  - **Analyze/Assess**
  - **Design**
  - **Deliver/Develop**
  - **Implementation**
  - **Evaluation**
- **Involve The Learner**
  - **Engage Them in The Learning**
  - **After Assessment of Their Needs - But Before A Learning Session**
    - Pre-reading of Assigned Articles on the Web
    - Pre-reading of Handouts & Study Guides
    - Reflection on Real Issues in Their Workplace
    - Pre-class notations on Sticky Notes
  - **In Workshop Setting**
    - Facilitated Discussions & Exercises
    - Practice Communications, Teamwork & Problem Solving With A Facilitator
    - Exercise With Tools Like Plan - Do - Study - Act , Etcetera

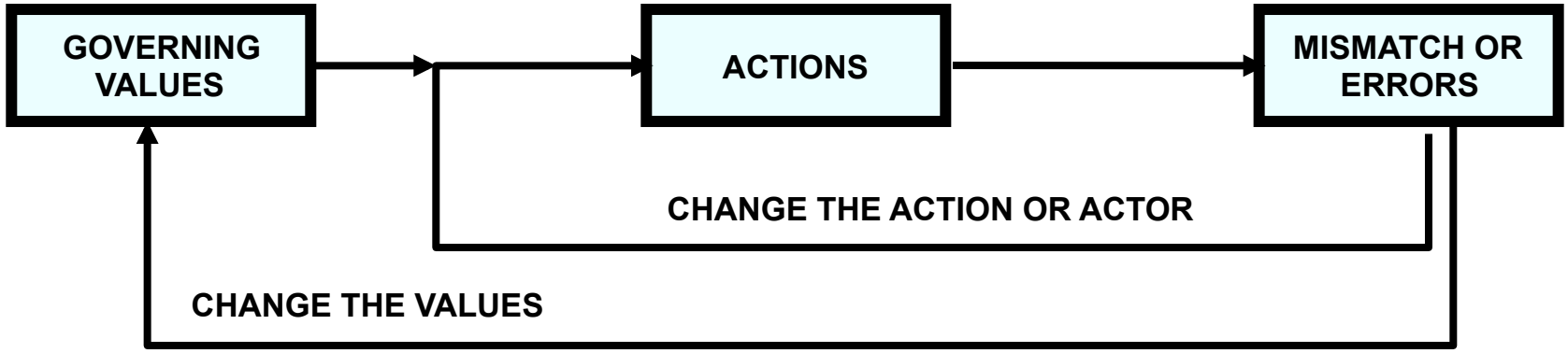
Single Loop Learning - Double Loop Learning

SINGLE-LOOP LEARNING



Invalid or Incomplete Information - Ineffective Roles & Policies, Designed Errors = *Fix Blame*

DOUBLE-LOOP LEARNING



Valid Information - informed Choices - Monitored Implementation = *Fix System*

Ladder of Inference

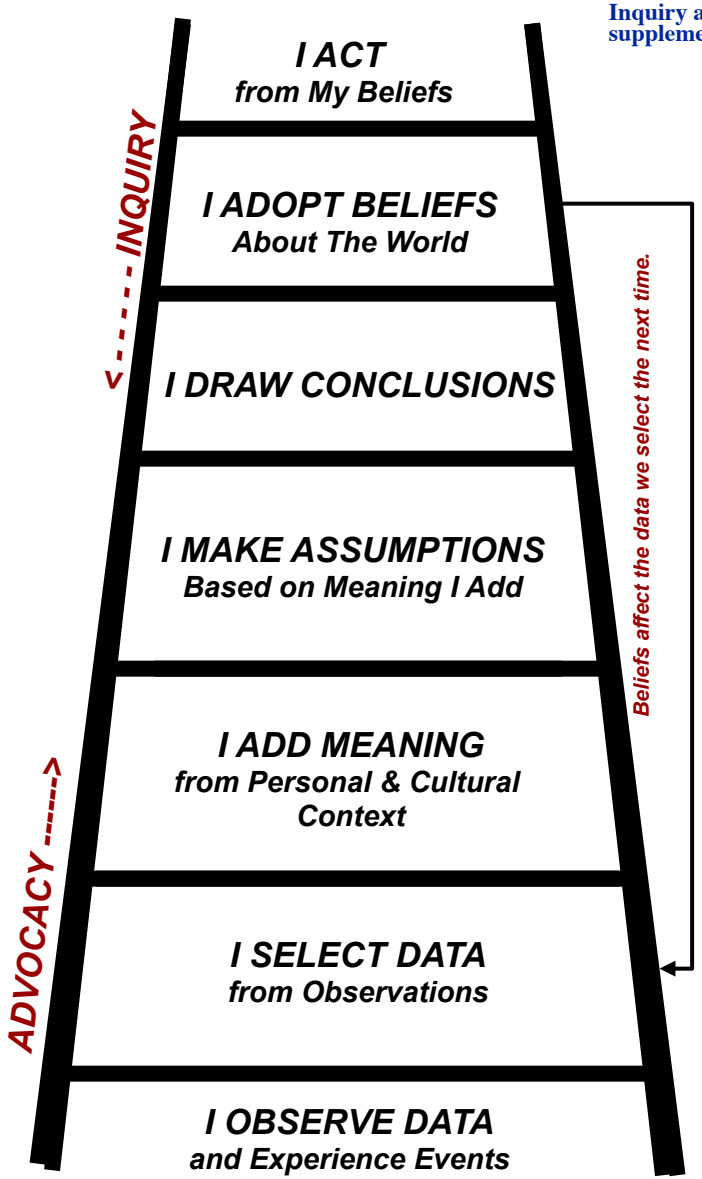
- The ladder of inference was first described in Chris Argyris' book, "*Overcoming Organizational Defenses*", and later in "*Action Science*", as well as in "*The Fifth Discipline Fieldbook*" by Peter Senge.

- The "ladder of inference" demonstrates how rapidly we can draw conclusions on our own, with little or no data to actually support the conclusions and no conscious thought about the process, as if rapidly climbing up a mental ladder and skipping a rung or two.

- We all have started first with observable data, and within the space of seconds, leap up to assumptions, then on to more generic conclusions.

- Since most of these conclusions are never discussed openly among team members, there is no way to check them in the impact on the organization or individuals within it.

- Thus, incorporating the "ladder" into everyday conversation has proven to be a pivotal component of helping a learning organization work. It gives people a safe way to raise and check their varied interpretations of events.



Inquiry and Advocacy logs and worksheets are useful supplements to "the Ladder".

_____I Acted

_____I Believed

_____I Concluded

_____I Assumed

_____I Added

_____I Selected

_____I Observed

Left Handed Column

•This "left-hand column" exercise is based upon the two-column method developed by Chris Argyris and Donald A. Schon, with further use by Peter Senge, Candace Pert, Nancy Oelklaus and others.

•In the left-hand column exercise, people select a difficult situation and reconstruct a pivotal, difficult conversation. In the right-hand column, they first write down what was said. In the left column, they articulate what they were thinking and feeling, but not saying. The case becomes an artifact through which people can examine their own thinking, as well as the systemic problems which underlie the difficult conversation. It makes it possible to discuss the un-discussable thoughts which have been covered up and not communicated completely.

My Thoughts and Feelings	*What Was Said*

The purpose is to become more aware of what is unsaid, to think about what you are <u>not</u> saying and also think about how to express the issue productively.

Organizational Defenses - OBSTACLES

THE OBSTACLES –

Skilled Incompetence

- **Change We Do Not Acknowledge**
  - **External Environment Always Changes While We Implement Solutions**
  - **Internal Environment (People, Culture, Brand, Performance) Always Change**
- **Single Loop Learning**
  - **Blaming People**
- **Organizational Inertia**
  - **Myth of the Management Team**
- **Faulty Inference From Data**
  - **Wrong Conclusions**
- **Fear of Embarrassment**
  - **Fear of Embarrassing Others**
- **Bypass**
- **Cover-Up**
- **Budget Games**
- **Making It All Un-discussable**

Managerial Malpractice

Organizational Defenses - SOLUTIONS

SOLUTIONS

- **Acknowledge Changes In The Environment ASAP**
  - **And In Every Meeting Ask "What Has Changed"**
  - **Adapt Plan To The Changes**
  - **Engage The Stakeholders**
- **Discussing The Un-discussable**
  - **Purposeful Dialogue**
  - **Ladder of Inference**
  - **Left Hand Column Tool**
- **ENGAGEMENT OF THE STAKEHOLDERS**
  - **Rebuild Trust**
  - **Listen Carefully**
  - **Understand What Matters To Them**
  - **Share Self Honestly Without Hostility**
  - **Ask For Feedback and Take It Whenever You Can Get It**
  - **Trust Others As Much As You Want Them To Trust You**
  - **Find Ways To Extend That Trust Further**
  - **Don't Confuse Trust With Being A Buddy**
  - **Don't Be Surprised If . . . . . .**
  - **Constantly Remind Yourself To Tell The Truth**
-

"New" Way Thinking

- **Knowledge Based Transformation**
  - Transformative Thinking
  - Leading Transformation
  - Use of Reformation and Transformation
  - Resource & Relationship Management
    - Striving for Balance
  - Thinking & **Learning** Together
    - Then Working Together
  - Continuous Investment
  - Use of Tools Appropriate To Problems They Can Solve
  - Use Thinking for Alignment
    - Systems Thinking, InThinking and Enterprise Thinking

Lunch!

- Let's collect our lunch!
- Room will be secure
- Staff will take your drink orders
- While you dine, discuss this
- Make sure everyone is heard from
- Be prepared to share your answers to the following questions!

TABLE DISCUSSIONS

AT EACH TABLE DISCUSS:

- **WHAT ARE OUR NEXT ACTION STEPS?**
  - **What did I learn here?**
  - **What do we need to discuss next?**
  - **Who else should be here?**
  - **What will we do with this learning?**
  - **When do we meet again?**

Future Agenda

Future Discussions = 3 Weeks + 1 Weekday

- September 28th, 2011
  - Lean Performance Appraisals - Eliminating the Waste
- October 20th, 2011
  - Comparisons of Quality Management Systems
- November 21st, 2011
  - How to Plan the Perfect Meeting
- December 8th, 2011
  - Six Sigma - Plans and Pitfalls
- January 6th, 2012
  - Continuous Improvement Paradigms & Principles
- January 30th, 2012
  - Accelerated Learning and Quality

• What Are Your Ideas?

Other Subject & Speaker Suggestions

- Benchmarking
- Brainstorming
- Civility - Lack of it Costs up to $300 Billion Annually (Pattie McNeil)
- Design & Control of Quality (Ian Bradbury of Peaker Services, Inc.)
- Effective Measurement for Training & Development Initiatives
- Gipsie Ranney
- Having Difficult Conversations - Principles and Tools
- Influence (Influencing Your Leader and Your Team)
- Lean Project: Eliminating the Waste In Performance Reviews (R. Steele of Peaker Services)
- Mentoring & Partnership Between Generations (Baby Boomer, GenX, GenY, Transition to Future)
- Quality Assurance Through Proofing

- What Are Your Ideas?

SERGENT RESULTS GROUP

CQI LEARNING LUNCH

Training vs. Learning

Why Performance Requires Learning