



# Unit 1 Learning Organisation

Staff Training Solutions

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Define your role as a manager and identify how that role differs from other roles you have had.
- ✓ Understand the management challenge and the new functions of management

## Unit 1

### Learning Organisation

#### About the Learning Organization

##### What is a Learning Organization?

The idea of **learning organizations** has gained significant importance since Peter Senge explored it *The Fifth Discipline* in 1990. (It was last re-written and updated in 2006.) In it, he presents well accepted practices for encouraging and creating organizations where all employees are committed to lifelong learning, with one central goal of continual growth and development.

One of the most compelling factors in support of **continual learning** is the rapid change of pace that we face today. Technology is evolving constantly, corporate hierarchies are frequently being reshaped, and job responsibilities are always shifting.

If learning is seen as the means to this end, the question then becomes, “How do we get started?” What steps do we take on Monday morning?

Translating learning into productivity involves several steps:

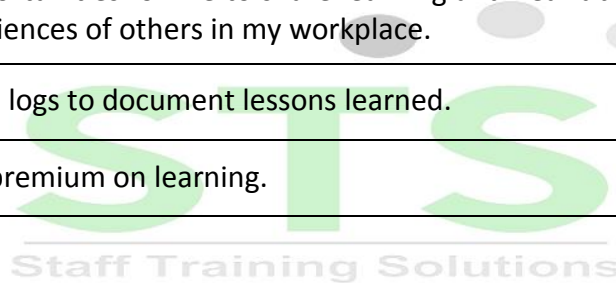
- 1) Understand how learning takes place, so that you can understand the most effective ways to learn.
- 2) Identify critical areas of responsibility.
- 3) Develop goals.
- 4) Intentionally transfer skills and tools learned back to your workplace in a relevant and meaningful way.

##### Are You a Lifelong Learner?

Learning involves two important factors: willingness and ability. If you have boundless opportunities but no desire to assimilate the information, real learning won't take place. Similarly, you can be eager but lacking in the appropriate skills; again, the opportunity will be lost.

Your success at learning depends on attitudes and experience. Is continuous learning marked by opportunities or obstacles for you?

	Yes	No
1) Learning doesn't just happen; it must be a conscious activity.		
2) In general, people learn when they need to or have to.		
3) My learning didn't end when I graduated from school.		
4) All jobs, no matter how routine, offer learning opportunities.		
5) People learn better from success than mistakes.		
6) It is my responsibility to create learning opportunities, not my company's.		
7) I can recall a valuable lesson learned at work in the past week.		
8) There are opportunities for me to share learning and hear about the learning experiences of others in my workplace.		
9) I keep learning logs to document lessons learned.		
10) I place a high premium on learning.		



### Scoring

Give yourself 2 points for each yes answer and 1 point for each no answer.

**18-20 points:** You get an A for attitude! By recognizing that effective learning is conscious, committed to memory, and communicated, you are likely maximizing learning opportunities. By embracing continuous learning, you are taking responsibility for your own development and probably enjoying significantly higher levels of achievement.

**14-17 points:** Don't leave learning to chance! You might appreciate the benefits of learning, but you may also need to make more of a conscious effort to retain lessons learned. Try to make one change to enhance your learning, such as keeping a learning log or sharing lessons learned with colleagues. You'll enjoy a considerable return on your investment.

**10-13 points:** Don't let learning lag! Continuous learning isn't just a buzzword that will fade away next year. To keep pace with change, improve your productivity, and succeed in your business, you must develop your skills and learn on an ongoing basis. Don't wait for someone else to provide learning opportunities – they're all around you.

## Achieving Personal Mastery

### What is Personal Mastery?

#### Introduction

Peter Senge identified five learning disciplines that he believed were at the core of leadership in learning organizations. They are:

- Personal mastery
- Mental models
- Shared vision
- Team learning
- Systems thinking

#### Personal Mastery

**Personal mastery** refers to successfully and consistently working toward our own goals to become as efficient and effective as possible. This is one of those aspects of life that is really about the journey we are on, rather than the destination, since we don't stop learning or pursuing once we reach our goals. As part of the lifelong learning process, we set new goals and keep going. We also recognize that in order to help grow the organizations that we work with, we must also learn and grow ourselves, and become better at what we do.

The term “**mastery**” refers to full command or understanding of a subject. Personal mastery, then, means that we have a great deal of understanding of what our own strengths are, as well as where we want to go.

If you are responsible for also leading people in the workplace, it is important to model our own commitment to seeking personal mastery. That means that we must demonstrate our commitment to learning and to setting goals and achieving them. This approach can also help you to support your staff in identifying their own vision, overcoming gaps in knowledge and performance, and finding a way to achieve their objectives.

#### Your Personal Vision

Let's take a few moments to capture our own personal vision of the future. What do you want for yourself? What characteristics do you want to demonstrate for yourself and others? What do you want to achieve?

We often find it hard to create a personal vision that we can articulate because of some of the concepts we hold from the past, which are also discussed in Peter Senge's work.

**We can't have what we want.**

While this may have been true in your past (that things you wanted were too expensive, extravagant, or not what you were entitled to, for example), our challenge to you is to suspend your self-doubt and judgment about those things. Identifying what you want is a way to start to identify our goals and how to get there. Let yourself do a little dreaming.

**I want what someone else wants for me.**

It can be easy to let other people influence what we want, and then we go after their goals rather than our own. Consider whether what you want was your own decision, or whether there is a lot of influence coming from your partner, a supervisor, or your parents. Sometimes we need to consider the needs of others when we decide what we want, but the decision must be our own and not someone else's if we're going to be motivated and go after it.

**It doesn't matter what I want.**

If you've had some of your ideas ignored or argued against in the past, you can get trapped into thinking that your opinion doesn't matter. You may even approach the exercise of setting up your own personal vision as if someone else is going to change it, so you write down the first thing that comes to mind instead of thinking through it. Don't shortchange yourself that way; choose a vision that is personal to you. You can learn how to be confident and go after what you want.

**I already know what I want.**

Knowing what you want means that you are already on the path to getting there, which is a great start. Your vision will continue to evolve over time, and since lifelong learning really is about the journey, keep an open mind and continue to work on your vision throughout your life.

**I am afraid of what I want.**

Sometimes the things that we really want also have the potential to scare us too. That's okay. If you need to work on smaller goals to get to your vision and make it manageable, then do that too. For example, you may want to change jobs but you realize that you need to take some training, do a lot of research, or wait for a better time in your life. Keep in mind that this is your vision; you can change it as needed, and revisit things when you are ready.

**I don't know what I want.**

This is a common feeling, especially if we have plenty of choices. Take the time to explore what you want, look at options, and work things through on paper and in your mind. These activities will help you move closer to knowing what you want.

**I know what I want, but I can't have it at work.**

Take a look at what you do have at work, and make sure that it fits in with your values and goals. Going through a values exercise can help you to see what you want, and will also make sure that



**Do you have a sense of how you might get started on your own personal mastery on Monday morning?**

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**Our Personal Vision and Our Values**

If you want to feel like you're getting more out of life, then we recommend that you set a personal vision statement. This will then help you set short and long term goals, which should influence your daily plan. All leaders need to know what they want from life and to have a plan to get there. You can think of it like a pyramid:



There are three important steps to creating your personal vision.

**Step One: Identify Your Values**

The list below reflects some common values. Choose the ten that are most important to you as a person (meaning that they apply both at work and at home). You can customize the wording, or add your own to the list.

Ability to make decisions and implement them	Ability to persuade and influence others	Achieving excellence
Achieving fame and recognition	Adventure and excitement	Behaving ethically
Being challenged by pressures and deadlines	Being organized and dependable	Being skilled and capable
Building a family	Building meaningful relationships with others	Competition with others
Contributing to society	Cooperation with others	Demonstrating expertise
Diversity in daily tasks	Doing something meaningful	Efficient and effective
Enjoying what you do	Environmental rights	Establishing a reputation
Expressing creativity	Feeling excited and stimulated by life	Feeling independent
Feeling of belonging and community	Feeling of inner harmony	Feeling of patriotism
Financial security	Financial wealth	Free speech/human rights
Freedom to set your own pace and goals	Having a feeling of security	Having power and control
Having privacy	Helping those in need	Religion and/or spirituality
Leading others to success	Moving at a fast pace	Moving at a slow pace
Being productive	Reliability	Self-development

Sense of accomplishment	Serving the public	Spontaneity
Truth and integrity	Working as part of a team	Working individually

We cannot focus on too many things at one time and remain effective, which is essential for leaders. Look at the ten values you selected and select the five that are most important to you. Cross the others off. Be firm with yourself if you need to be. Remember, you are focusing on what is really important to you.

Next, reduce the list to just three values. These are the things at your very core. Cross the other two off your list. Put circles around the three items that are your core values.

**Step Two: Define Your Values**

Now, outline what success for each of those values would look like.

**Value One**

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**Value Two**

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**Value Three**

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**Step Three: Put It All Together**

Finally, bring the three statements together into one paragraph. You may feel that you need to go back and re-evaluate your values, or you may want to re-work some sentences to create what is meaningful to you. That's OK! Above all, this should be a reflection of your innermost thoughts and a roadmap for how you would like to conduct your life.

**Use the space below to write out your vision statement.**

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#### **Session Four: Analyzing Our Mental Models**

The second discipline from Peter Senge’s work asks us to reflect on the way we picture the world.

If you move into a new neighborhood and you expect your neighbors to be friendly, you are more likely to say hello and get to know those neighbors than you would if you thought you were moving into an unfriendly or dangerous neighborhood.

Differences between **mental models** also explain how two people can witness a crime and explain it differently to the police. (This is a fascinating phenomenon for crime writers and investigators.) Some people will witness the event, or the alleged criminals involved in it, in entirely different ways. Was the robber wearing a baseball style hat or a knitted cap? Was he wearing a dark jacket or a sweater? Driving a car or a van? When investigators ask more than one witness for their descriptions, and the answers are yes to all those questions, we see the reflection of different mental models.

The same principle applies to what you see in your environment. If you are thinking about getting a dog to add to your household, you start noticing every dog around you. You can spot dogs that are walking quite a distance away, notice what breed they are, how well behaved they are on a leash. This also happens when you or someone you know gets pregnant, and suddenly it seems that there is a baby boom going on. Your awareness to these things in your environment has changed your perception of the world.

Our mental models exist somewhere below our awareness, so we do not look at them very often. The core **challenge of this discipline** is to examine what your mental models are; explore the impact they have on our lives; and consider whether making some adjustments would result in living with more meaning, purpose, or satisfaction.

When it comes to our workplaces and different industries, there are mental models that can actually hamper results. If classroom teachers believe that parents don’t know anything about education, the parents do not get invited to discuss changes to schooling. If management in a manufacturing facility believes that their hourly workers are lazy or unproductive, they will not tap into the knowledge that those workers have to see what could be improved.

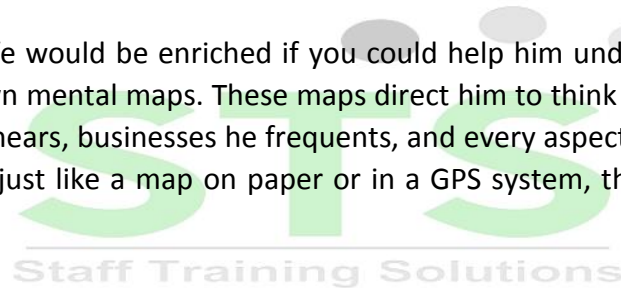
When it comes to the workplace, we have to increase our awareness so that we do not dismiss ideas as being a fad or irrelevant to us. If we are aware of our mental models, we can then be open to innovation and creativity.

### **Strategies for Working with Mental Models**

You may have come across people who always blame things on outside sources. You probably know someone who has had a horrible boss, a spouse who left, and an unhappy life, and is able to blame all of it on everyone else. They may even ask you why there are so many nasty, messed up, or otherwise negative people out there.

If you are feeling sympathetic, you might even agree with your friend that other people are pretty messed up. But if you genuinely wanted to help him, you would need to step in and show him how he attributes his problems to others, and that he must also take some responsibility for the results he sees. His beliefs about people are having a direct impact on what is happening to him, without him even realizing it.

Imagine how his life would be enriched if you could help him understand that mental models are the result of his own maps. These maps direct him to think in set ways about himself, other people, stories he hears, businesses he frequents, and every aspect of the world. We all have these mental maps, and just like a map on paper or in a GPS system, they are all flawed in one way or another.



### **You can create new mental models!**

If we think of science, we know that human beings can do an extraordinary number of things now that we could not do two hundred years ago. We can send people and machinery into space, we can milk hundreds of cows on a farm in a single day, and we can communicate with people around the world easily. Just think of what is to come in the future!

Coming up with new mental models is easier if you link the goal with an action plan. We see this happening in customer service where a company says, “If we really want to serve our customers, we have to start by wanting to serve them, instead of seeing their requests as an interruption to our day.” With support and practice, this new view of our customer base starts to have a positive impact on how staff members feel about work, and how our customers feel about doing business with us.

If a new mental model is going to be successful, we need to follow through with an action plan and then bring the model to life.

## The Ladder of Inference

We tend to hold onto beliefs that are not tested. We might have the beliefs because of decisions we make or because of past experience, but this doesn't mean that they are correct!

We might feel that:

- Our beliefs are the truth.
- The truth is obvious.
- Our beliefs are based on reality.
- The reality that we select is the reality that exists for everyone else.

For example, let's say that you are giving a presentation to your company's senior management. One manager (we'll call him Stephen) is checking his BlackBerry, answering messages, and clearly disengaged from your work. At the end of your comprehensive presentation, his only comment is to ask you for more detailed information, in a report sent via e-mail.

You know that if you do prepare that information, it's unlikely that Stephen will read it. Plus, that all the details are in your presentation. As you start brooding this over, you remind yourself that Stephen has never shown any respect for you and that he did not want to hire you to this team. Clearly, Stephen doesn't know what he is doing, and by the time you take your seat at the table, you are thinking about Stephen as a big jerk. You've also decided you are not going to create a special report for him; you'll send him a summary of your presentation, because he won't read it and won't know what's in it anyhow.

In those few seconds before you take your seat, you have climbed up what Chris Argyris calls a **ladder of inference**: a common mental pathway of increasing abstraction that often leads to assumptions and misguided beliefs.

You did start out with observable data (Stephen is at the presentation), and then added his behavior (distracted by his BlackBerry and answering messages). But then you added some meaning of your own: that Stephen doesn't respect you and didn't want to hire you. Finally, you label Stephen as a jerk.

This process tends to take place very quickly, and most people aren't even aware that they climb the rungs of this ladder in their head. The only visible parts for anyone else are the observable events at the bottom of the ladder, and anything that you demonstrate at the top, where you've made your decision about what to do. The discussion going on inside your mind (which you probably can't or won't verbalize) and your journey up the rungs of the ladder are not visible to anyone else.

We can climb these ladders of inference very easily. The more I believe that Stephen does not support me, the more likely it is that I am going to notice his unsupportive behavior in the future.

This becomes a reflexive loop, where my beliefs will influence the data I am going to select the next time I see Stephen.

There is naturally also a reflexive loop here for Stephen, where he will react to my antagonism. He is quite likely working on some rungs on his own ladder, and before long, we could find it impossible to work together.

It's possible, however, that what you witnessed in the meeting was Stephen dealing with something else. Perhaps he was bored or distracted, but it is also possible that he was checking his BlackBerry because of an emergency he had to deal with. Maybe he was interested in your presentation, but the fact that you didn't print a copy off for everyone led to his request for something that he could look back on and refer to.

As a professional, it might have been best for you to find out if there really is a problem that you and Stephen need to work out. What would happen if you asked him about the meeting? What if you asked him for some feedback on your work and the efforts that you are putting in to your projects? Would you hear his answer?

**Reflection: Using Your Own Experiences as a Resource**

You can learn a great deal by increasing your awareness and giving some thought to situations that you experience. Try writing out an exchange with a co-worker, a troubling event, or even the scenario with Stephen above. Then, set it aside for a week before you look at it. This will give you the time and distance needed to review it clearly.

Let's look at an example.

What I Was Thinking	What We Said
We're two months late on this, but I didn't think that he knew. I was hoping we could catch up before he figured it out.	<b>Stephen:</b> Jim, I'd like to come down there next week. We're a few weeks behind, and I think we might all benefit from a meeting at your office.
I have to stand my ground with this. I'm responsible for this, but I can't volunteer for more work.	<b>Me:</b> I am concerned about these deadlines, and there have been some delays that we did not predict. We're working around the clock, but it would be good to talk about things in more details, and for you to come and have a look.

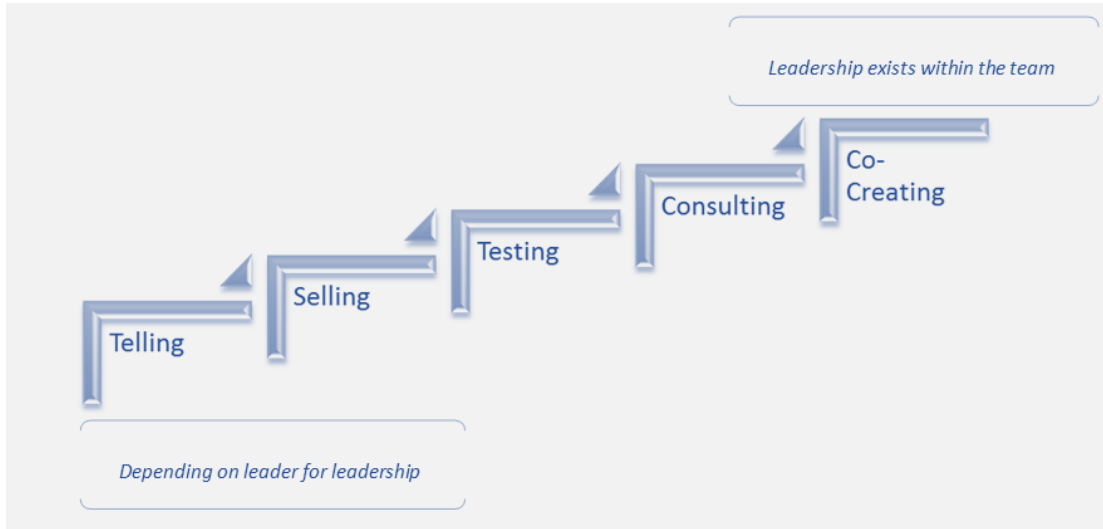
<p>This help would have been better in the planning stages so we could use his experiences in our forecasting. It's too late now to bring that up.</p>	<p><b>Stephen:</b> It's occurred to me that we need more communication between us.</p>
<p>If he stopped making changes, that would be a huge help.</p>	<p><b>Me:</b> Well, I'm happy to talk through any changes that you have in mind.</p> <p><b>Stephen:</b> I don't have anything specific in mind.</p>
<p>If I can hold him off for two weeks, we should be ready.</p>	<p><b>Me:</b> I'd like to have a finished model to show you when you come down. Could we arrange this for the 15<sup>th</sup>?</p>

You can use this format to evaluate your own examples, either as they have happened or as they might take place. As you think of your own examples, remember that you are trying to work at a higher level of awareness.

## Achieving a Shared Vision

It was common belief at one time that the leader needed to be a visionary, and then the team would do the work to make the vision come to life. We know now that this is not the way to motivate people, or to inspire a company. Having a **shared vision** helps to build commitment within the group. When people share a vision, they have a collective sense of what is important, and they can create a plan to collectively achieve the goals.

A **shared vision** lets the group determine how much support they need and where they will get it from. There are different models that will show something similar to the following diagram, where the process begins with the leader having to provide instruction (telling them what's expected) to selling them on the idea, and becoming less necessary as the group takes on the task and completes the work.



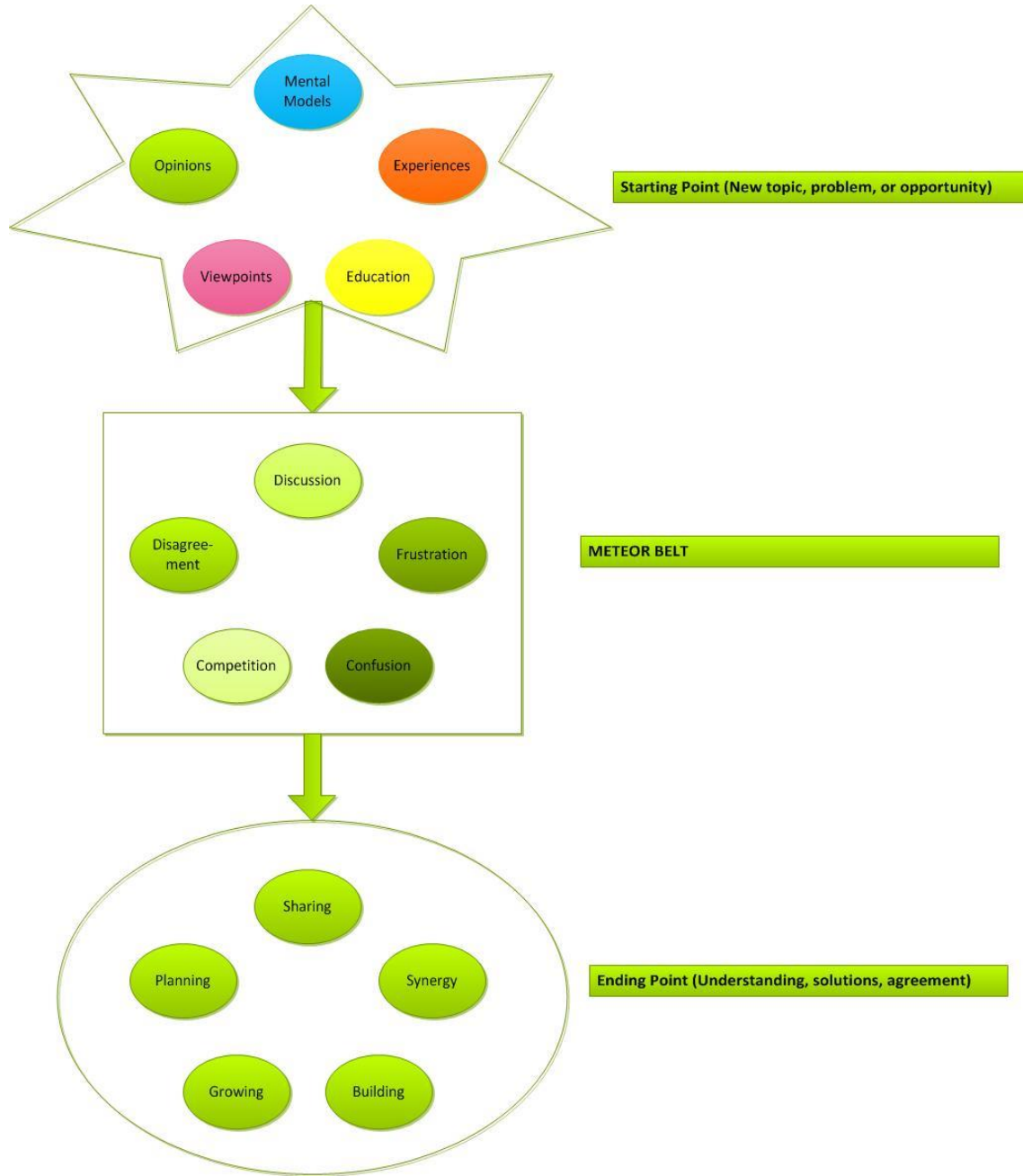
The team's degree of involvement and accountability increases as they move through the phases.

## Team Learning

When people work together as a team, they all bring their individual mental models to the table. The **team learning discipline** transforms their individual conversational and thinking skills, so that they can develop greater skill than that of any one individual.

**Team learning isn't team building.** Instead, it draws on the skill of building shared vision and on systems thinking to capitalize on the value of multiple inputs toward one cause. Having skills to improve dialogue is a primary medium for management teams to build these capabilities in their employees, although it takes some concerted effort to get the individuals to move away from their independent and linear comfort zone and contribute to the collective mentality of the group.

We expect a discussion to start at Point A and proceed directly to Point B (Decision Point) to reach an agreed upon conclusion or decision. This doesn't happen. Between Point A and Point B is what we can refer to as the Meteor Belt, a time of differing (and often conflicting and colliding) opinions and viewpoints. However, if we don't get everyone's ideas on the table and encourage everyone to see where others are coming from, it will be almost impossible to build sustainable agreements.



### **Protocols for Skillful Discussion**

In Peter Senge's *The Fifth Discipline Fieldbook*, he presents a system for making discussion more productive. The idea is that team learning will take place as a result of good, open dialogue. Here are his five elements for skillful discussion.

#### **I will pay attention to my intention.**

- Consider what I want from this conversation.
- Decide whether I am willing to be influenced.

#### **I need to balance advocacy with thoughtful inquiry.**

- Can you tell me what led you to that view?
- Help me understand by explaining \_\_\_\_\_.

#### **I will try to build shared meaning.**

- When we use the term \_\_\_\_\_, what are we trying to say?
- What are others hearing us say?

#### **I will increase my self-awareness as a resource.**

- What am I thinking?
- What am I feeling?
- What do I want at this moment?

#### **I will explore impasses or roadblocks to look for ways to move forward.**

- What are we able to agree on?
- What actually happened? Where's the data/information?
- What do we disagree on?
- What are our goals and values about this?

### **Preparing the Ground for Skillful Discussion**

Here are some of the things that you can do as a leader to help your team navigate the minefield of the meteor zone and reach safe ground.

#### **Create a safe haven for participants.**

At the beginning of the meeting, the leader has to establish a safe place for discussion. Don't allow individuals to become territorial or overbearing. Outline some rules of engagement at the beginning so that respect is maintained. Remove barriers to good discussion that can interfere with progress, like a focus on job titles, status, or prestige. This will help keep all team members on an equal level, and encourage curiosity, innovation, and team work.

**Make openness and trust the rule rather than the exception.**

People don't automatically trust one another, and early in the team development period, trust needs to be worked on. Make sure that all participants understand that they can speak freely, without worry that they could become a target of criticism, ridicule, or retribution. One of the ground rules needs to be that nothing discussed gets mentioned outside the room, unless participants agree that some aspect of the meeting needs to be shared with other parties. Grounds rules will help to set things in motion, but trust will only grow if all participants demonstrate that they will behave in a trustworthy manner.

**Encourage and reward the injection of new perspectives.**

Groups that meet often or regularly can get a bit stale, especially if they are relied upon for innovative ideas or creativity. Find special guests (even if they are internal employees from different areas and specialties) and invite them to a session. Right and wrong ideas are not the focus here; the exchange of perspectives and different points of view are to be supported and encouraged.

**Plan the agenda, time, and context to allow for concentrated deliberation.**

If you want meetings to be effective and efficient, send an agenda out in advance. This is the best way to ensure that participants come expecting to talk about the intended subjects. Remember that creative discussion takes time, so make sure you plan accordingly. Keep distractions (especially phone calls, text messages, and interruptions) to a minimum.

## Systems Thinking

At its broadest level, **systems thinking** encompasses all those theories that explain the flow of activity at work. Even though there are multiple and diverse approaches, the one common thread that connects them is that all systems follow certain common principles. Understanding systems thinking helps us to see how we can alter systems to make them more effective, and how we can align ourselves more closely with larger processes of the natural and economic world.

Simple paradoxes crop up regularly in organizational life. The time of your greatest growth is the best moment to plan for harder times. The harder you strive for what you want, the more you may undermine your own chance for achieving it.

Anyone in sales is familiar with the **sales cycle** of prospecting for clients, closing the sale, implementing the transaction, and then back to prospecting for sales again, and the need to always have more than one prospect or one sales contract in the works.

One example of a **system** we are all familiar with: the grass grows, cows eat the grass, the grass is converted into food for humans, and the waste products go back into the soil to produce more grass.

