Achieving Integrity of Purpose:

Using Experiential Learning to Align Vision, Systems and People

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None of us, when asked, would describe our organizations as "perfect." In other words, there is always room for improvement; we can always become better. This simple concept is the cornerstone of change management theory: where we are is not where we want to be.

Changing Our Organizations for the Better

One way to approach[1] the change process is to think of the "current state" and imagine the "desired future state" (see figure 1).

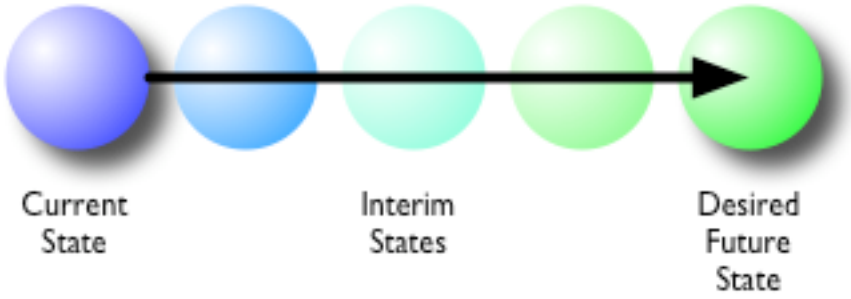

Figure 1 — To get from what it is today to what it wants to become, an organization must go through a series of interim states between the current state and its desired future.

Our description of the desired future is often called our organizational vision. Having a vision of where we want to go is vitally important to our success[2]. Companies often struggle to define an accurate vision for themselves.

While defining a vision—the "what" of the future—is difficult, describing the path—the "how" we will get there—is even more difficult[3]. What is required is an integrity of purpose, a consistency of effort on the part of everyone in the organization. Will an organization change and move toward its vision just because the boss says so? Of course not. Everyone must be invested in reaching the vision; every person's role must be aligned.

The analogy of an electromagnet may be helpful at this point. An electromagnet becomes magnetic—able to accomplish work by picking up metal objects—when a bar of iron is placed in an electromagnetic field (figure 2).

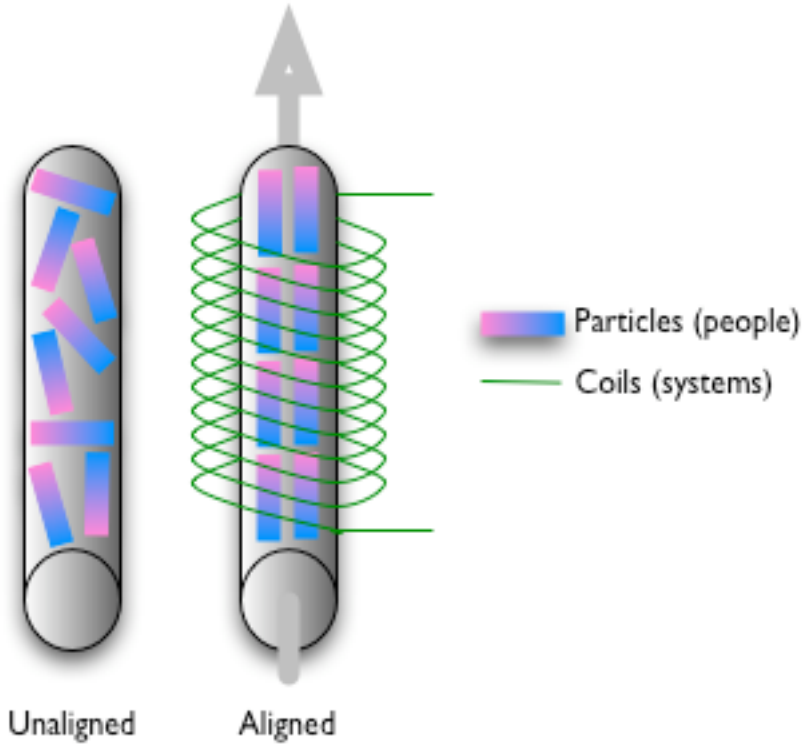

Figure 2 — An electromagnet makes a good analogy for an organization. A metal bar must be composed of particles that are capable of becoming aligned, and must be place in an energized coil to produce the magnetic effect.

This works only because of two very important components. First, the iron bar must be wrapped neatly in a wire that carries an electrical current. If the wire is not wrapped neatly, or if the wire carries no current, the electromagnet will not form. So there must be an external electrical system to cause the magnet to work. Second, the bar itself must be composed of an element that is capable of being aligned magnetically. An aluminum bar wrapped in wire could not become an electromagnet because the aluminum atoms are not capable of developing a magnetic polarity. In other words, the internal particles in the bar must be capable of being aligned.

Three Elements of Change: Vision, Systems and People

The electromagnet can be likened to an organization. Just as an electromagnet attracts a plate of steel, an organization's vision is that future that it is drawing to itself. An organization is able to do this only because of two factors.

First, the systems that support the organization must support the vision. Improperly wrapped wires around an electromagnet will not create the needed electromagnetic field. Conflicting and poorly constructed systems in an organization—information systems, communication systems, reward systems, production systems—will not produce the desired results. Second, the people within the organization must have the capabilities—the skills, the motivation, the understanding—to align with the organization's vision. That organization which lacks either systems or people, or in which either is not aligned with the organization's vision, will lack integrity of purpose and will ultimately fail.

We Must Learn to Lead the Change

Our question then becomes: how can we make sure that our vision, systems and people are aligned, that they have integrity of purpose? The answer is simple to believe, but difficult to do: we must be taught. After all, people define our vision; people create our systems; people are the building blocks of our organizations. People, too, must go from their present state of knowing less well how to do something, to the desired future of knowing how to do it better. To achieve integrity of purpose, our people must be taught.

Our next challenge becomes determining how people should best be taught. We are often tempted to return to a model for teaching that is familiar: our experiences as school children. But adults are different, and learn differently, than children.

Adults have experience that they bring to a learning situation. The best learning occurs when they are able to link past experience with new concepts they want to learn (figure 3). Adults also want to be engaged in the learning. Dull, boring learning experiences will have adults rightfully thinking of the many other things they have to do rather than concentrating on the learning. Adults want to be engaged, to participate. Simply put, learning must be fun. Often in school we experienced learning that was not fun and we conclude that learning and fun are mutually exclusive. But if we think about when we learned the most, we will often recognize a component of enjoyment that made the learning "stick."

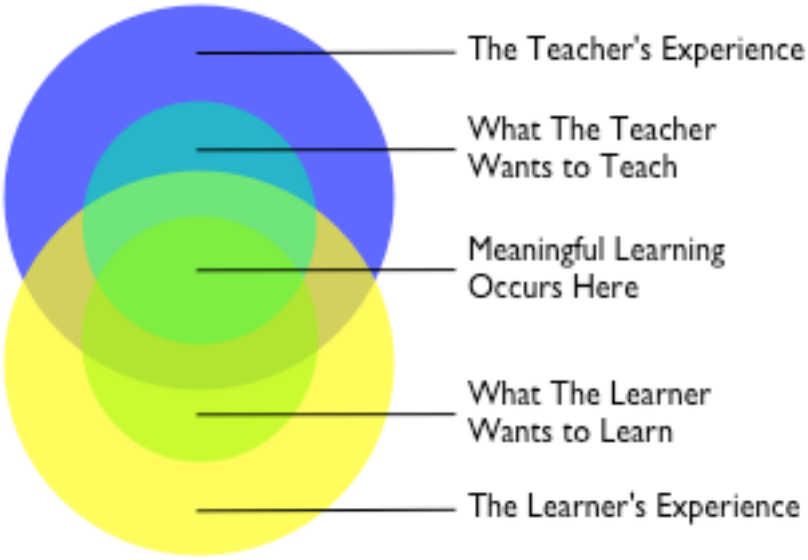

Figure 3 — The most meaningful learning in adult learners occurs at the intersection of the teacher's and the learner's experience, enhanced by what the teacher wants to teach and what the learner wants to learn.

One of the most powerful ways to teach adults is through experiential learning. There is an old saying, "Tell me a thing an I will probably forget it. Show me a thing and I may remember. But let me do a thing, and then I will understand." This is the premise of experiential learning. People, especially adults, learn best by doing, through their own experience. Thus a major component of any organizational change becomes helping people to learn what they need to know by giving them opportunities to grow from their own experience.

Experiential Learning is Learning by Doing

Experiential learning contains four steps[4] of a cycle (see figure 4). The first step is the learning experience itself. It is here that people participate in an activity that is engaging and fun. This must be followed by a time of reflection in which the participants ask themselves, "How did that feel? What did I observe about myself and others? What did that mean?" If the reflection stage does not follow the experience stage, the experience simply becomes an interesting diversion, a game.

Following reflection comes the generalization stage. Here the participants are encouraged to make links between the experience they just had and real life. What can be learned from the experience? How does this experience relate to reality? Finally, the participants are encouraged to apply what they have discovered to their own work situations. The goal of any learning, especially experiential learning, is a change in the participants' behavior, a change in what they say and what they do. This final phase "takes it home" by allowing them to do something different in the future.

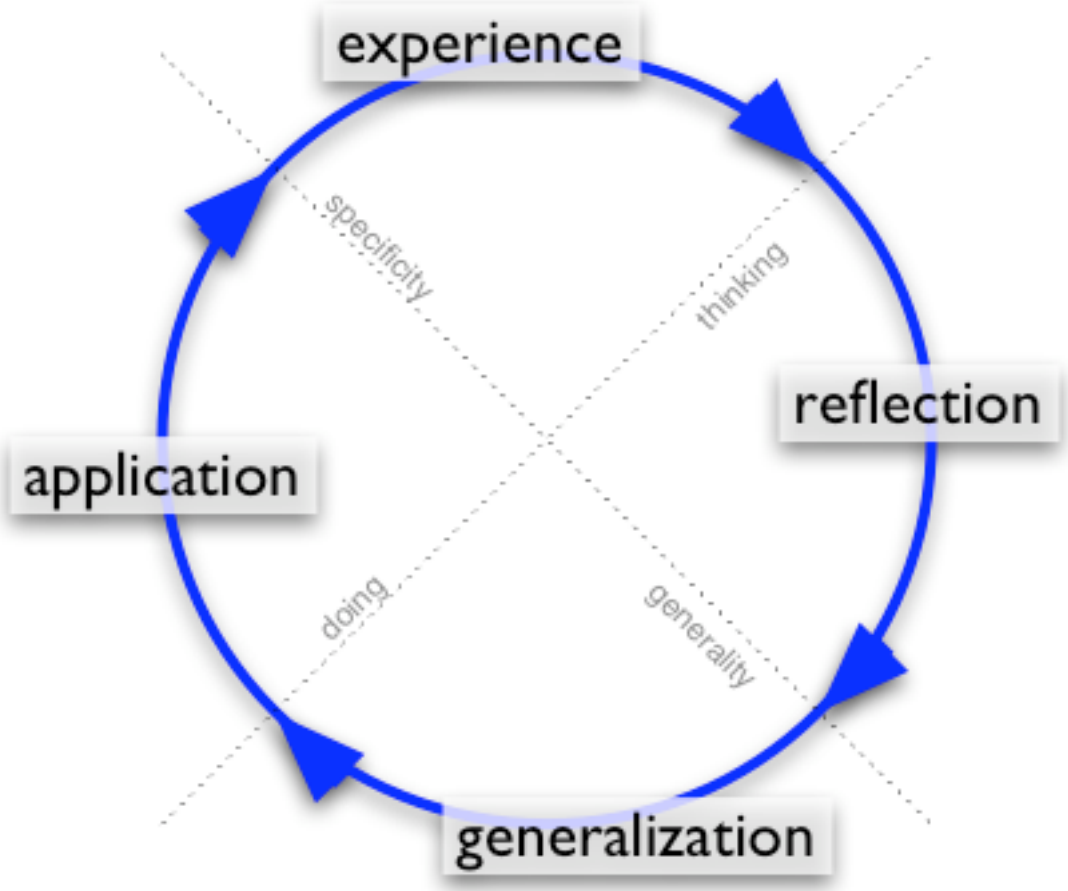

Figure 4 — The experiential learning cycle contains not only the experience itself, but reflection about that experience, generalizations about what the experience means in broader contexts, and the application of those generalization to the job "back home." Note that the cycle can be divided into halves base on specificity (the learning experience) and generality (work in general), and between thinking and doing.

Experiential learning is one of the best ways to achieve integrity of purpose. It addresses the three critical areas of organizational change:

VISION: people can focus on where the organization is going
SYSTEMS: people can analyze the external influences on how the organization works
PEOPLE: people can examine their own internal motivation and their relationships with each other

Experiential learning takes many forms. Some of it is done outdoors and often involves an element of personal challenge, such as overcoming a fear of heights. Some is done indoors, but still in a very active way. These learning experiences often take the form of a physical problem to be solved. Some experiential learning is more quiet, involving pen

and paper exercises and self-examination. In spite of their wide range, they all share the common purpose of giving people an opportunity to experience something that will ultimately allow them to grow so that the organization may achieve its vision.

Kids, Try These at Home!

The following are some brief descriptions of experiential exercises that are simple to do, yet rich with learning. The following can only provide a hint of the actual activity. The best understand comes from, not surprisingly, experiencing them in person. Additional details about how this can be accomplished are available from CEATH Company.[5]

Vision Exercises

Lost in the Fog: A team of blindfolded people attempt to move through a series of obstacles (trees, rocks, chairs, tables) to reach a common vision.

Learnings include the importance of a shared goal and the communication systems that allow them to reach it. They also have opportunities to examine their own behaviors around risk taking, playing it safe, and supporting each other.

Works well for a group from ten to thirty. A richer experience outside, but easily done inside as well.

Streets and Alleys: Pairs of people try to find each other through rows of teammates. The problem is that the rows keep changing into columns and back again.

Learnings include the importance of aligning with a vision and how arbitrarily changing systems and structures can severely hinder progress.

Works particularly well for a very large group (over fifty) and is easily done indoors or out.

Acid River: A team of people attempts to leave a sinking "island" across a "river" filled with "acid" using bricks and boards that, at first, appear inadequate. Working together, they solve the problem of too few resources and ultimately reach safety.

Learnings include the importance of staying focused on the objective and how to explore options without "burning bridges." The participants also have opportunities to examine their own behavior toward each other in a stressful situation.

Particularly good outdoors where the artifacts won't damage carpet or walls. Best done with five to twenty people.

Systems Activities

Shopping for Shoes: A simple pen and paper exercise in which people attempt to diagnose and document the steps required to go shopping for shoes.

Learnings include how people approach the same situation differently and the importance of listening to each other. Participants also have an opportunity to think logically about an event that usually has little logic associated with it.

This exercise can be done alone, in pairs, or in small groups. As in any experiential learning exercise, the real learning comes after the exercise during the discussion.

Factory on a Desk-Top™: This experiential simulation is one of a class of simulations that model real organizations. This particular one places participants in roles in a simulated factory as assembly line workers, production supervisors, materials management people, and so on. It models the supply chain from supplier to factory to end customer.

Learnings include the complexity of manufacturing systems and how a change in one place may cause problems in another. Participants are often brought up short by their accusations toward each other for problems that turn out to be systemic in nature.

Simulations of this sort are complex to design, but extremely rich in learnings and well worth the effort.

Nuts 'n Bolts: A simple simulation in which participants form an assembly line to assemble nuts and bolts. Work rates are determined by a dice roll; the ultimate result is poor productivity because of systemic variation.

Learnings include the multiplicative effect of process variation and a deeper understanding of the need for process control. Here, too, participants often tend to blame each other rather than the system, resulting in an opportunity to examine personal behavior.

This simulation is very simple and easy to set up. I have often made a large wager (say $100) with participants that they cannot meet seemingly reasonable production targets. The results are at once comical and instructive.

Quantum Leap: In this exercise participants toss a ball back and forth in an established sequence. They then repeat the process, attempting to reduce the time required. Most groups make a 1500% improvement in their time!

Learnings include how much we let our own limitations and adherence to existing systems stand in the way of dramatic improvements. Participants must interact, propose ideas and listen to each other if they are to be successful.

This works well inside or out. The best group size is between fifteen and twenty, but can be used with groups up to thirty in size. The equipment is simple: a ball and a stopwatch.

Exercises to Focus on Human Relationships

Moon Landing: This classic pen and paper exercise asks participants to rank, first individually and then as a group, a list of items recovered from a crash on the moon. The "right" answer (from NASA experts) is then revealed and individual and group efforts are compared.

Learnings include how we work together is as important as what we work on. Participants get to observe their own process and learn something about consensus decision-making.

This can be done in multiple small groups. It is best to provide each group with a flip chart for writing ideas.

Trust Walk: Participants are paired up, one blindfolded, the other not. The sighted participant leads the other on a trust walk without speaking. Optionally the roles can be reversed for a second walk.

Learnings include how it feels to have to trust another person and empathy for those who may not have all the information they desire. Learnings also occur around responsibility and nurturing another person.

This exercise can have a profound effect on people. The exercise often leads to deep discussions about trust. Any size group can work; if there is an odd number, have two people lead one around. I prefer doing this activity outdoors; the senses of touch, hearing and smell are often heightened.

Personal Assessment of Communication Styles: This is a pen and paper instrument in which participants respond to a series of words, which may or may not describe them. At the end of the exercise, participants score their instrument to discover more about their preferences for the four communication styles: Pointed, Expressive, Cautious, and Thorough.

Learnings include appreciating one's own preferred styles and the styles of others (which may be quite different). A second learning often comes in a discussion about how communication might be misinterpreted between people who prefer different styles.

This exercise is simple to do (requiring only the instrument itself and the scoring sheet) but it often creates a lively discussion and results in a deeper appreciation and understanding of people who are quite different in how they communicate.

The Supply Officer Problem: This is another pen and paper exercise in which participants work in pairs. They decide whether to cooperate with their "opponent" or to leave them holding the bag. In the end, a score is developed determining who "won."

The exercise makes very clear the provable superiority of cooperation, even in a zero-sum game. Participants also learn about how they might behave, given the opportunity to "cheat."

This exercise is based on a mathematical proof called the "Prisoners Dilemma." I have used it for groups of well over one hundred and had it work well.

Where To From Here?

These exercises are provided to give a flavor for the variety and richness of experiential learning. Each exercise has a specific purpose and has been shown to provide a deep source of learning.

While experiential learning is not difficult to conduct, it does require skill on the part of the leader or facilitator. A thorough understanding of the experiential learning cycle (see figure 4) is necessary, as is an appreciation for the needs and concerns of the students. One recommendation is that, before plunging into experiential learning as a technique, trainers should spend time experiencing how to lead the exercises with a more seasoned veteran.

The reasons for doing experiential learning remain consistent: it has its own integrity of purpose. Experiential learning touches the heart of how adults learn. It has the aim of changing individuals so that they are better able to articulate vision, design systems, and develop internal motivation, all with the goal of improving the organization.

Are we where we want to be? Of course not. Only if we work together, within systems which support us, for a common goal will we truly be able to change. There must be integrity in our purpose--through vision, systems and people--and experiential learning is a powerful tool we can use.

A version of this article appeared in the conference proceedings of the American Production and Inventory Control Society's Thirty-Eighth International Conference and Exhibition, October 26, 1995. The accompanying presentation won the conference's the "Best Conference Workshop Speaker" award.

Endnotes

[1] For more information, see Richard Beckhard's work on this subject

[2] The complete quote from Proverbs 29:18 is, "Where there is no vision, the people perish."

[3] Columbia University's Warner Burke has done extensive studies of this phenomenon.

[4] The model presented here is one I find most useful. There are several models of experiential learning, all useful. University Associates has one of the most well known and respected. Special thanks are due to Patricia Newmann of Patricia Newmann Associates, Karon West of University Associates for their insights here.

[5] More information about these and other experiential learning exercises may be obtained by contacting CEATH Company (see below). Special thanks are due to Lois Lukens and Jim Armstrong of Saturn Corporation. They have been a source of inspiration for several of the exercises.

Need help designing high energy and meaningful experiential training for your organization? Please contact us at:

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