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# action**learning**labs

*Turning difficult transitions into breakthrough opportunities*

By

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*A new method for understanding and creating  
change for leaders, organizations and individuals*

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## Why Action Learning Labs?

Individuals and organizations often find themselves at a crossroads, where doing more of the same simply doesn't work. At such times, "tried and true" methods tend not to work either. You may sense that the issues you face cannot be solved at the level of complexity at which you are currently operating. You may know what is not working, but don't know what would work. Perhaps you sense a bigger yet more challenging future ahead, but can't see how to get there.

What if these difficult transitions could be transformed—reliably—into situations where our most pressing questions and challenges become the fuel for creating viable responses and solutions? What if intractable problems could become a gateway to sense and influence an emergent future? What if we could reliably and consciously evolve ourselves, cultural myths that no longer serve us, and the outmoded institutions we depend upon?

## What Is An Action Learning Lab?

An Action Learning Lab is a new method of understanding and creating change for leaders, organizations, and individuals. Action Learning Labs can be of particular use to individuals and groups who are:

- ❖ Facing profound formative challenges—e.g., significant transitions or adaptive dilemmas for which patterned and habitual responses are no longer sufficient;
- ❖ Seeking to discover or develop social innovations; and
- ❖ Seeking to change the way they create value, along with the deeply embedded beliefs and patterns of behavior that reinforce their signature approach.

While Action Learning Labs can focus on an individual, a group, an idea, or an emerging field or discipline, the process of an Action Learning Lab is always a relational process. Whether involving two or two hundred, this process proceeds from an intention to align with and support whomever or whatever is the focus of the Lab, cultivates the conditions for the emergence of wisdom and right action, and embodies and experiments with potential pathways forward.

An Action Learning Lab can be completed in one session in a few hours in a single day, or unfold over many months through multiple Lab sessions.

We use the term *lab* to reflect the experimental and experiential nature of the work that occurs within these processes. In the movie *Apollo 13*, about the NASA mission to the moon that almost ended in tragedy, the crew radios Mission Control that they have a problem. One of the first responses from the NASA scientists and engineers is to create a lab. They use a space capsule simulator and test different options for how to respond to

the crisis before recommending a course of action to the crew. In Action Learning Labs, our intention is to create a space where participants can experiment with, and experience some of the consequences of different options before committing to a particular path forward.

## What are the essential underpinnings for Action Learning Labs?

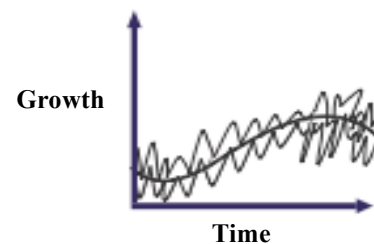
First: *In any moment* a deeper wisdom is available to us; there is a more whole, healthful, and purposeful way for which Life energy seeks embodied expression. We use different phrases to describe this phenomenon, more or less synonymously: *the evolutionary impulse*, *what is emerging* and *what is wanting to happen* are three phrases that appear in this paper. While such language is imprecise and awkward, we use it to convey our conviction that a living system is constantly engaged in legitimate efforts to bring about stability or adaptation as it makes its way in the world. This means, a system's instinctual efforts or gestures are a reliable source of information about what might be needed next. What is more, it is counterproductive to impose an ideal on a living system.



Second: With courage, discipline, and playfulness, we can intentionally collaborate with this evolutionary impulse. Groups especially, have profound capacities for collective intelligence, insight, and sensing, related to but distinct from these capacities in individuals. These collective capacities, when developed and focused, can create a reliable portal for a deeper wisdom to emerge and inform what will happen next.

Third: There are principles and processes that, when pursued with intention and focus, can help groups realize their capacity to become conscious allies of a system's evolutionary impulse, co-authors of what is emerging and taking form. We call this unique combination of principles, processes and structure the Sensing and Shaping Process. This approach is based on a stance, an orientation to *come alongside* an individual or group, much as a mid-wife partners with a birthing mother, and moves in steady rhythm to assist the individual or group in giving birth to what is seeking to emerge through them.

Fourth: We can more readily align with, and co-create with an individual's or an organization's evolutionary impulse if we embrace a living systems perspective. All living systems have beginnings; all living systems confront dilemmas as they mature and evolve; and all living systems at some point die. These natural cycles exist independently of human will. We can choose to cooperate with and influence these cycles within certain parameters, or we can struggle against them. But we cannot fundamentally alter their order and unfolding. Moreover, within any living system, movement is *always* happening, something is *always already* emerging. A big part of this work involves helping people discern where they and their



endeavors can be located from a life cycle perspective, and to use this understanding to align with and guide what is already in progress and now ready to take form.

Fifth: Conflict, a sense of being stuck, or chaos within a living system is a signal that something deeper and legitimate is trying to unfold. When creatively engaged, such conflict and chaos can allow us to make contact with, and enter into rapport with a system’s evolutionary impulse. An essential dimension of this work, for both individual participants and the group as a whole, is to release the fascination with symptoms associated with conflict or chaos, and begin to explore, from many different vantage points, what is forming underneath the drama. A related challenge, at a critical stage in the process, involves summoning the courage and discipline to look no further than what is happening in the embodied expression of the person or group. Many of the core practices we employ are intended to encourage and facilitate this process of suspension and new ways of perceiving.

### What Kinds Of Issues Can Be Addressed With This Approach?

Action Learning Labs can be useful in a variety of contexts, including groups or individuals facing formative challenges, seeking to create or extend the application of social inventions, and/or working to consciously change their identities and roles. Each of these contexts represents a palpable fissure between past and future, an opening that offers opportunity and profound risks for the individuals and groups who face them.

While Action Learning Labs often work at multiple levels concurrently, we have found it useful to differentiate four levels of engagement: the individual; the group (from a small work team to a community); the innovation; and a larger field of background influences (world view, theories, practices). See figure 1. This differentiation allows us to frame the initial question or invitation in ways that resonate with the beginning orientation of participants, while holding the possibility of attending to other levels during and through the process.





	Where Identity Takes Form	Implementation
<b>Key Individuals:</b> 	<b>Unique Gifts</b>	<b>Yours To Do Relationships Agreements</b>
<b>Groups &amp; Organizations:</b> 	<b>Founding Genius</b>	<b>Offering and Org. Architecture Culture</b>
<b>Innovation:</b> 	<b>Breakthrough Insight</b>	<b>Product, Service or Experience Adoption Strategy</b>
<b>Background Influences:</b> 	<b>World View</b>	<b>Theory Of Change Practices</b>

Figure 1

When an Action Learning Lab is focused at an **individual** level, the questions are often about issues of identity and role. In this context, within this current reality: *What is ending for me? What is emerging? What are my distinctive talents and what is uniquely mine to do? What kinds of partnerships or agreements are called for?*

When a Lab addresses the **group** or organizational level, the questions center on the relationship of core identity and founding genius to the way value is generated through a distinctive organizational architecture and culture. *What is/was the founding story and purpose? What is distinctive about the way this group or organization creates value? What kind of organizational structure and culture is a good fit for the way this organism exchanges value with customers, beneficiaries, investors, partners, suppliers, etc.?*

When a Lab is focused on the development of an **innovation**, the questions shift to the idea and to the structures essential for cohering and diffusing the idea: *What is the essence of the idea or invention? What resources and other support structures will be essential for the incubation and maturation of this idea? What may have to end before this idea can take form in the world? What will enable adoption of this invention by a broader community?*

When focused at the level of **background influences**, such as the larger field or world view, Action Learning Labs can: a) help participants discern an emerging whole underneath some seemingly related but not yet integrated practices and developments; and b) enable pioneers to explore the promise and limits of a new paradigm. *What are the essential underpinnings that unify different practices and developments? What is the next evolutionary leap for this field? What conditions are necessary and sufficient for this way of thinking and acting to be viable? When, where, and how does it break down? How does this world view translate into coherent and repeatable theory and practice?*

We have found that any level can serve as the entry point or beginning focus for a Lab. Moreover, once a Lab begins, multiple levels will likely need attention. As the group and other relevant parties endeavor to develop what is emerging, and discern and commit to the pathway forward, other forms of engagement beyond an Action Learning Lab will likely be appropriate and necessary.

## **The Sensing And Shaping Process**

When viewed as a practice over time, we refer to this co-creative approach as the "Sensing and Shaping Process." In a sequence of unfolding steps, with corresponding practices and indicators of progress, we work with the system's instinctive efforts to form and differentiate new behavior. We currently represent this process as a series of seven fluid, overlapping stages. See Figure 2.

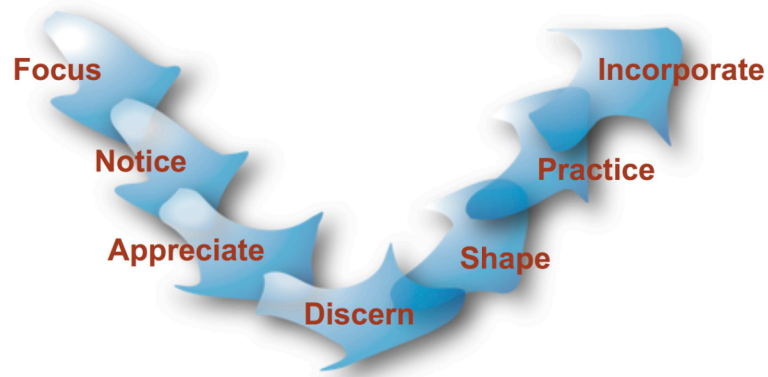


Figure 2. The Sensing And Shaping Process

The entire process, and each stage of the process, can unfold at various depths, in varying lengths of time, and employ various individual and group process modalities. The process is not linear. Rather, we work with elemental and cyclical forces. This often requires counter-intuitive moves, such as in gardening, where pruning can lead to new growth. What follows is a brief exploration of each of these stages, including stories to illustrate the work of each stage and some of the practices and orientations we have found particularly helpful.

### Stage 1: Focus

#### ❖ *Beginning a Lab*

Labs begin in several ways: sometimes an individual or group approaches a facilitator with a request; sometimes we have approached others with an offer to conduct a Lab.

The beginning stage of any Lab involves a process of discernment by the facilitators and the individual or group requesting the Lab about the initial level of focus: individual, group, social invention, and/or larger field.

Once an initial focus has been selected, the facilitators, together with the individual or group leaders who are asking for the Lab, develop an initial design for the Lab, including the number of sessions that may be required, where and when the Lab will occur, and other details. Sometimes, as part of the preparation, we have engaged in mini-Labs as facilitators or with a leadership team to gain clarity about the structure and process modalities we want to recommend for a Lab that involves a large number of people.

Discerning who should participate in the Lab is an essential initial task for the facilitators and the conveners. We have conducted Lab sessions with as few as four people and as many as 120. Sometimes the individual or group calling for the Lab already has chosen the participants who will participate; sometimes they ask Lab facilitators to create the group. In either case, some of the considerations that inform who should participate in a Lab include:

- Who is essential to include so the whole system can be adequately represented, including divergent or even conflicting perspectives?
- Who is essential to insure that the group as a whole will have access to the skill sets it needs to engage in the modalities likely to be pursued in the Lab?
- Who is essential for the individual or group calling the Lab to feel that their interests will be honored?

❖ *The invitation*

The quality of the invitation extended to each Lab participant is an essential aspect of any Lab. In most labs, each of the initial participants are personally invited either by one of the conveners or the lead facilitator/s. For Labs that meet over an extended period of time, personal invitations to new members can come from someone in the group.

We also pay attention to the hospitality extended at the beginning and throughout the Lab to support the experience of personal welcome. Even the structure and arrangement of the room where the Lab is held can amplify, or block, the energy of hospitality. In one Lab, we shifted the seating arrangement in the room from a formal panel-audience structure to one that helped participants engage with each other as peers and co-learners, despite the profound differences in role and authority that characterized their relationships outside of the Lab.

❖ *Beginning a Lab Session*

Those responsible for facilitating a Lab must model through their actions and intentions what a Lab is for, and how participants can engage to support the larger inquiry. We have therefore developed a practice of gathering the facilitators prior to the beginning of each Lab session to reflect upon the principles of Action Learning Labs, to give voice to our intentions in this particular Lab, and to center our awareness on the specific inquiry of the Lab and the larger ecosystem within which this inquiry is occurring. We sometimes use this time to practice some of the actions that will begin the Lab session.

When all participants have gathered, we begin the Lab with a simple exercise to focus the group's awareness. For example, this can include brief iterative rounds of introductions, inviting participants to say their name, what drew them to the Lab, and their intentions and hopes for the experience.

Regardless of the focusing process used, we have found it essential to invite Lab participants to pursue a mode of inquiry that transcends the imposition of individual will or ideals. To help accomplish this, we often share stories about previous labs, offering images of some of the particular ways we might work with key choice points, including what we might pay attention to or how each of us can contribute. Sometimes, we also introduce techniques from improvisational theatre or team sports as a way to practice and anchor norms that will be useful as the Lab progresses.

Despite these initial efforts to anchor the group's focus, we understand that the focus of the Lab will likely evolve over time. Each Lab opens a gateway for a dynamic exchange at multiple levels of experience. The facilitators and the entire group must return repeatedly to the question of focus, to what the invitation is now and from where and for whom it is arising. The original call and focus of the Lab may not be the ultimate work or the only work that needs to occur through the portal created by the Lab.

Following the opening process, there is typically an orientation in which we clarify the origins of the particular Lab, who was invited and why, what our current understanding is of the inquiry and issues to be explored, and the anticipated or hoped-for outcomes and products. In our work with two social entrepreneurs, there was a dynamic interplay between a focus on the particular social invention each person was bringing forth, and each of their roles in relationship to the movements that were organizing around the social inventions. In both cases we ultimately bifurcated the process, focusing some lab sessions on the social invention itself, and what the invention now needed to evolve to its next stage, while focusing other lab sessions on the social entrepreneur's changing role and identity.

### **Stage 2: Notice**



Once the group has developed shared understanding of its focus, the next stage of the process invites participants to explore how the living system in question makes its way in the world; its signature way of being. The purpose here is to develop together a shared understanding for how this being or system functions as a whole, how it forms stability and manages change, what dynamic movements are already appearing, and what structures or patterns of behavior may be preventing the system from taking its next developmental steps.

Using a variety of methods and tools, including, but not limited to storytelling, role-playing and simulations, we might:

- Map or depict the diverse stakeholders and perspectives;
- Illuminate the gifts or concerns of each major role or function within the system;
- Examine the current interactions of parts of the system (for example, asking, what happens when...?);
- Surface central beliefs and attitudes that define what's important and real within the system;
- Surface and model the distinctive way/s the person or organization creates value in its ecosystem;
- Distinguish what this system welcomes or includes and what is excluded;
- Notice recurring patterns and signals or stimuli that trigger these patterns; and
- Inquire into how the current design of this system compels it to act as it does.

Our intention in this stage is to enter into deep rapport with the living system. We explore the unique way this person, group or community gets along and creates value, *not* so we can change or fix something, but rather to cultivate an understanding for what *is* and how it operates. We notice the distinctive ways this system responds to prompts for change; also how this person or group tries to influence its surroundings. We are also preparing for the next stage, where we will listen for what is needed to enable this living system to take its most natural next step or leap.

Throughout the Lab, participants are invited to shift their attention back and forth between their perceptions of reality within the larger context they are attempting to affect, and the reality within the group itself as a representation of that larger reality.

Action Learning Labs in theory invite participants to notice what is both within the larger context they are attempting to affect, and within the group itself as a representation of that larger reality. In practice, the particular layers and dimensions of reality that participants are called to name and attend to will depend upon the focus of the Lab, and what energies and dynamics appear as the Lab progresses. In general, issues that arise in the group, during the context of a Lab, are explored as if they are a *case in point* of dynamics that need attention in the system.

### **Stage 3: Appreciate**



As participants progress and deepen their exploration, the group focus shifts from *what is* to *what is needed*. That is, the group begins to listen and sense for an action, an understanding, an acknowledgement, or structure that the group intuitively is ready to emerge and be seen now. Individual participants may give voice to what they think *should* be included, or what they want to see, but these reflections are held as data and inquired into for what is underneath, rather than dictating an immediate path to action. The essential questions we invite the group to hold and inquire into during this stage are:

- From a lifecycle perspective, what is this system trying to accomplish, or learn how to do or be?
- What functions are trying to be served, even if only partially and crudely, by what is happening now?
- Are there any signs of a latent structure or function that may only be dimly present or perceived at this time, but may be essential for the long-term viability and sustainability of the system?

For example, in a Lab session with William Ury, co-founder of the Harvard Negotiation Project and co-author of *Getting to Yes*, we focused on his role within an evolving movement to extend the application and uses of his Third Side conflict resolution framework. As the Lab progressed, we noticed that Bill had a characteristic way of initiating and structuring projects that inevitably led to the following pattern: partners

would become “seized” with one or more of Bill’s ideas, would immediately begin acting on these ideas in a wide variety of uncoordinated directions, and then when complexity and obstacles ensued, would become fixated on Bill as the source of direction. Bill’s response, repeatedly, was to feel overwhelmed and withdraw.

In this stage of the Lab process, we invite the group to use the awareness it developed from the previous stage, *notice* (what is), to inquire into what it thinks the system is trying to accomplish through a repeating response pattern or gesture. In the Lab with Bill, we had the group role-play the pattern of Bill generating an idea, sharing it with colleagues, the colleagues becoming seized and moving immediately to action. As chaos began to emerge in the role-play, we asked Bill how he most wanted to respond to what was unfolding. His response: he wanted to slow things down. So we asked him: what would slowing things down look like? Bill moved back into the role-play with this intention, and began to use a particular gesture to reflect the pace and structure he wanted. Partners in the role-play then began to mimic the typical behavior in the larger system, reaching out to Bill to tend to one crisis after another. We then invited the group to inquire underneath this pattern to sense what this system was trying to accomplish and what function might now be called for, but had not quite developed yet, or perhaps was only faintly present. What the group discovered was the need for a leadership structure with the capacity for reflection and self-correction.

The movement from a focus on what is to appreciating what is needed is subtle, and particularly challenging to many groups. Most of us understand problem solving: we define a problem, and then apply solutions that have worked in similar circumstances in the past. We are used to moving from a fairly narrow problem definition to what we *think* should happen to fix the problem. Loosening our identification with any particular past solution, and listening instead for what this particular moment and context is pointing to and calling for, requires discipline and a collective capacity to work with what emerges within the group without trying to force an answer. Yet our experience is that the solutions we uncover through this approach allow us to have more impact, in a more sustainable way, with far less effort and expense.

We have found several practices and orientations to be particularly helpful in this stage of the work. For example, focusing part of the group’s inquiry through questions grounded in the life cycle perspective—e.g., What is seeking to evolve here and what functions may be needed to assist this movement? Is this a movement of differentiation, maturation, or is something now coming to an end? How would you describe the need in terms of a function? Forming a boundary? Regulating an exchange of some sort? Gathering? Conserving? We have found these and other formative distinctions can help shift participants orientation from what they think should be happening to looking for what already is unfolding; or what might indicated because the function is felt to be missing (e.g., the way a room with no windows feels like something is lacking).

Inviting participants to give physical form to movement they sense within the context or system they are seeking to impact can also help loosen attachment to habituated responses and preconceived solutions.

Finally, inviting the group to consider what is or has been excluded, either within the lab group or within the larger structure and context the group is seeking to impact, can begin to reveal some of the missing or divergent perspectives that may be needed.

#### **Stage 4: Discern**



This is a stage of discovery, and one that requires a particular kind of perceptual acuity. In this stage the group more fully relinquishes its insistence on predetermined paths to action and begins to apprehend the whole of what is and how this unique organism unfolds or flows from one form to the next.

This stage is the most difficult to write about and describe. Any words will undoubtedly feel abstract and amorphous.

To accurately discern what is emerging requires what the 19<sup>th</sup> Century scientist and poet, Goethe, referred to as “new way of seeing”<sup>1</sup>. In this stage, we encourage participants to connect with the unique genius and distinctive way the person or organization brings value into the world. We listen underneath the understanding and insights that have emerged thus far. The aim in this stage is to perceive or recognize the generative movement or evolutionary impulse that is already taking shape and suggesting a specific way forward. The group is searching for a felt sense of *how* the system may be changing and reshaping itself into a more complex form. We pay particular attention to what may be barely perceptible, latent, or felt to be missing. In this stage, it is helpful to observe responses and gestures evoked by the developmental challenge at hand. Gestures are observed with attention to what might be coming-to-be at this particular stage (e.g., to open up, to form a boundary, to consolidate, etc.). We remain particularly alert for those responses that seem to evoke a sense of right relationship or the “quality with no name.” To proceed to the next stage, we are looking for those instinctive gestures that respond with integrity to the divergent perspectives that have emerged in the prior stages and evoke whole system alignment.

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<sup>1</sup> From Theory of Colors (original German title, *Zur Farbenlehre*), a book by Johann Wolfgang von Goethe published in 1810:

“An extremely odd demand is often set forth but never met, even by those who make it: i.e., that empirical data should be presented without any theoretical context, leaving the reader, the student, to his own devices in judging it. This demand seems odd because it is useless simply to look at something.”

“Every act of looking turns into observation, every act of observation into reflection, every act of reflection into the making of associations; thus it is evident that we theorize every time we look carefully at the world.”

“The ability to do this with clarity of mind, with self-knowledge, in a free way, and (if I may venture to put it so) with irony, is a skill we will need in order to avoid the pitfalls of abstraction and attain the results we desire, results which can find a living and practical application.”

As the group moves into this stage, we typically have only a faint hint of the shape of things to come. Sometimes this stage is full of focused intensity; at other times the energy may barely be perceptible. Often a gesture, a statement, or a set of actions may appear within the Lab session and this becomes our gateway for trying to discern what's trying to happen.

In the Lab session with Bill Ury described above, many in the group were tempted to offer immediate solutions for how Bill could relate more constructively to his partners as they charged in to action. Instead, this stage of the Sensing And Shaping Process asks us to heighten our attention to what impulses might be present but barely discernible or distinguishable. With Bill, as chaos began to emerge in the role-play, we asked again, "What is your instinct?" Bill's response was "to go to the mountains, to reflect, to pull back." Rather than dismissing this as wishful thinking or labeling the behavior as avoidance, the art at this stage of the Lab involved paying attention to and honoring what showed up, and then interacting with this instinct with the goal being to discern the legitimate function or next layer of complexity that might be seeking to emerge. It didn't take long to recognize that this instinct to slow down, pull back and ask "what's missing?" was precisely the kind of critical reflective function needed in several of Bill's projects. This discovery informed the question for the next stage in our process, which was, how to translate that function into a viable shape, including a working set of agreements and organizational operating structures.

With the group responsible for global internet platforms at Hewlett-Packard, the subtle impulse showed up differently. This division of HP was caught in an impossible situation—a structural trap of trying to respond to urgent and potentially profitable business needs, while constrained by severe budget limits. To explore what might be emerging underneath this mess, in the Lab we examined more carefully what was happening underneath a recurring pattern of conflict. In the previous stage, the group came to realize that in an increasingly commoditized market, the role of IT engineering must shift. By having an appreciation for the kind of innovation that will be perceived as valuable by the larger organization, these engineers we're primed for a key discovery in this discerning stage of the Sensing And Shaping Process. As they examined how IT engineers responded to the recurring dilemmas, someone asked, "What if they don't know?" That is, what if senior leaders do not see the link between their support for budget restrictions in one area and the risks of severe business consequences in another? The question completely reframed the issue, and invited exploration of many new possibilities for action. By exploring the potential function suggested or embedded in this question and its implications, group members began to understand that *they* were *uniquely* positioned to provide cross-organizational data about trade-offs associated with investments in global information technology and budget reductions. They began to recognize that they could add new value, even in an organization preoccupied with cost cutting and conservation of resources, by helping senior leaders distinguish high from low leverage IT investments.

The discernment stage is one of the most challenging for a group to engage, in part because it cannot be scheduled or planned. While this stage is what all prior stages have

been preparing for, when it begins to cohere, groups almost always miss it—at least initially. Participants may ignore the impulse that appears, or move too quickly to define and contain it: a comment or perspective may be dismissed initially as a distraction, or a new action may be interpreted in familiar terms that obscure the budding possibility.

This pattern occurs in almost every Lab: a surprising impulse or movement appears, the group initially misses or misjudges it, and then circles back to re-engage the impulse with a clearer intention to be informed by what was emerging rather than imposing a pre-conceived response. However, we have found that this cycle of learning can be accelerated if the facilitator/s interrupt and name this pattern as it appears. What is more, this critical moment in a Lab offers a significant learning opportunity for participants. The ability to perceive a gesture that arises from a system's evolutionary impulse is a capability that has many advantages.

### **Stage 5: Shape**



As the group begins to sense what is emergent, its work now shifts to experimenting with different forms and shapes for the impulse. The intention of this stage is to help participants generate and try out different forms or ways to express the impulse. We also experiment with different levels of intensity and duration, sensing into what is essential regardless of form, and what may be contextual or ultimately irrelevant. At the same time, the group is also seeking to understand what this nascent impulse is suggesting about what dimensions should be preserved, and what may now need to be repaired or relinquished.

The shaping stage involves the creation of some kind of prototype, a physical manifestation of what is emergent: a physical enactment, a role-play, a map, or some new diagram or physical model. In a Lab co-sponsored by the National League of Cities in Lakewood, Colorado, participants struggled to reconcile an impulse to engage residents in short-term, focused dialogues on the City's looming budget crisis, and an impulse to pursue a more deliberate process focused on creating a deeper sense of place and identity across the City. We divided participants into several groups to describe different pathways forward. When we moved to physically map on flipcharts the different scenarios from these workgroups. However, as the flip charts were arrayed, a third option became apparent: a short-term budget dialogue process as a beginning stage of a longer-term community building effort. Seeing this third option emerge visually helped the group recognize how the new option was born out of synthesis of the separate proposals.

In the lab focused on Bill Ury's relationships with his partners, we allowed space and time to legitimize and experiment with his impulse to "go to the mountains" when partners rushed to action. In this stage, we generated several versions of what that impulse might look like in action, especially when expressed or formed in slightly different ways. The goal at this stage is to form a continuum of alternatives, with each option consistent with the function of the original gesture. Therefore, we asked, "How

far is enough for you to feel that you are in 'right relationship' to the partnership?" Bill answered, "Well, actually, it's not so much a static position that feels right, as much as it is the ability to wander and wonder." What felt most natural to Bill was the freedom to circle and observe the projects, taking a larger view and inquiring into what might be missing, what might be needed next. So we invited Bill to try different variations of wandering and wondering, leaving and returning. As we explored different ways to embody this impulse, also what new value this function offered to the projects, Bill and the Lab participants could sense how helpful it would be for this function to be acknowledged, and for Bill to clarify this role up front with his partners. Articulating and incorporating this new leadership function has eliminated many of the conflicts present within Bill's projects, allowing him to more effectively offer his unique talents to initiatives emerging around the Third Side.<sup>2</sup>

This is what we mean by giving the new response or solution shape: finding the actions, structures and corresponding principles that enable the system to realize and benefit from what is trying to emerge. This stage also frequently circles us back into an earlier stage, such as appreciate (what's needed) or discern (what is emerging). As we begin to give an idea or a response a shape and explore the nature of that shape, it often reveals other aspects of the system looking to emerge that up until now have gone unnoticed. This reveals the true nature of this process as circular, interconnected, and one that unfolds one layer at time. What emerges has been co-created by our active participation with it, rather than a static, finished system waiting for us to discover it.

Exploring the function of the emergent gesture or impulse and experimenting with different forms, intensities, and time durations generates distinct options. Each option can be tested for its viability and sustainability under a variety of likely circumstances. All of this is part of the discovery process: trying out different options under different circumstances to discern the system response that participants recognize as most alive.<sup>3</sup>

## Stage 6: Practice



The transition between giving the emergent impulse a shape and the work at this stage of practice can be rapid or unfold over several lab sessions. In the prior stage, the group is exploring different forms for the impulse; in this stage, the group has begun to orient to a particular form and is now working to encourage the assimilation of the form and

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<sup>2</sup> At the same time, for the person who has originated a project to wander in and out of key conversations can create tremendous confusion and disarray. Therefore, subsequent Lab sessions with Bill helped develop leadership structures that effectively accommodate and leverage, rather than become disabled by, Bill's gifts and his preferred style of "wandering and wondering."

<sup>3</sup> We might compare this process to moving furniture around in a room until we discover the arrangement that reverberates with a felt sense of "this is it." Christopher Alexander describes the aim in architecture as looking for a good design, which he defines as one that provides inhabitants with the resources they need to resolve the conflicts that will predictably occur in certain spaces. For example, a good entryway design aids in the transition from the outside to the interior space. Alexander, Christopher, *The Timeless Way of Building*, Oxford University Press: New York, 1979, pp. 114-115.

associated practices. In some contexts this may involve group role-plays; in other settings it may mean testing a prototype of a particular product or process. The group also begins to consider how to adapt to or compensate for potential stressors, and begins to explore what structures and supports will be necessary for moving forward.

The intention of this phase is to give the group an opportunity to test the emerging forms before having to implement them in real time in their live contexts. More importantly, the behavior associated with rehearsal and practice builds new neural pathways, which is essential for enduring capability. A discipline essential for this stage and for the previous stage, is for the group to resist a premature rush to conclusion or real-time action, and instead to focus on the emergent form that is taking shape and how to nurture it and make adjustments as needed under a variety of conditions.

How would we know if the group has succeeded in this stage of practice? The new shape, process, or structure works, even under pressure. Also, and just as important, the individual or group exhibits the ability to invent new responses, and the agility to course-correct as conditions change.

For example, in a Lab session with another division of Hewlett-Packard, one of the business units responsible for deployment of enterprise software applications used the practice stage to accelerate learning about the changes that needed to be embraced by globally dispersed teams in order for the new software deployment strategy to work. The Lab session organized a simulation that enabled key stakeholders from around the world to experience the key choice points and challenges that might be encountered by local teams. Problems surfaced immediately. However, because the group was in a Lab and not a real world circumstance, participants could practice how to implement the new approaches that had been discovered in the previous Lab stages. In part as a result of this rehearsal and subsequent learning from direct experience, HP has dramatically reduced its cycle time and success rate with software deployments. In the words of one IT Director: “Before the Labs, when we used to reach the ‘go live’ point, we encountered disasters. Now when we go live, it’s a non-event.”

In many Labs, particularly those involving intact work groups, this stage often requires the group not only to explore how to implement some new practice, process, or structure within a larger system, it also involves participants practicing how to engage with each other differently when they re-enter the larger system.

For example, in Lakewood, CO, one of the critical insights that emerged from the *notice* stage was an awareness of an outmoded dynamic that involved excessive deference given to City officials by Lakewood residents. As Lab participants worked to evolve structures to facilitate community dialogues across the City, they used Lab sessions to practice more effective patterns of interaction within the Lab group itself. At one point, the group, which included some but not all City Council members, became anxious that they did not yet have the endorsement of the entire City Council for their plans to move forward. As participants continued to explore what was underneath their hesitation, however, they grew clear that they did not need City Council's approval to move ahead. They could

begin to act independently, even while they invited the Council to endorse the plan at a subsequent Council meeting. The negotiation of this moment of ambiguity within the group provided a tangible opportunity for the Mayor and Council members who were members of the Lab group, and the other participants who are not elected officials, to practice a different pattern of relating to each other.

In a different Lab, participants used a conference call to craft the story and method of engagement they would use to introduce a proposed change and to outline what they wanted to give and get in key conversations with sponsors. By walking through these loosely structured preparations, participants practiced how to respond to the anticipated objections and concerns of those they sought to mobilize. In this way, the Lab session as conference call reinforced the neural connections that underlie the ability to behave in new ways, especially when facing cues that could easily trigger collapse of the new capability.

### **Stage 7: Incorporate**



Incorporation does not necessarily involve elaborate action planning, although it can. Often, this stage requires comparatively small commitments or slight but potent adjustments to existing routines and practices.

For individuals, it is important to translate the insights that emerge from a Lab into specific applications and commitments. When will this new approach be tried? What specifically will be done differently? How and when will the individual have an opportunity to get feedback on this new practice? Groups and communities make agreements about next steps, about who will do what by when to initiate the change. In a Lab focused on a social invention or organizational change, this stage may involve outlining or designing a different kind of process, such as product development, organization design, or the creation of a support and guidance system.

For example:

- We facilitated a Lab for a program officer at a national foundation focused on the role this officer might play to develop a new agenda for philanthropy in the U.S. As a result, the program officer recognized the need to redirect some of his attention and energy away from grantees to cultivate learning relationships with other funders, many of whom already looked to his foundation as a model for innovation. The incorporation stage included planning for who he would approach about specific opportunities, and how.
- Following breakthroughs in our work with leadership teams at Hewlett Packard, we asked what would help globally dispersed stakeholders commit to a proposed change of strategy. One approach included the development and interactive sharing of alternative scenarios with stakeholders who did not have direct access to the Lab experiences.

Of course incorporation sometimes involves complex action plans as well. For example, the Lakewood team used the foundation built in the previous stages to design a multi-tiered community engagement process that eventually involved hundreds of residents in facilitated dialogues over a three-month period.

Regardless of the focus of the Lab, in this final stage, participants work to discern what now needs to occur to help what has emerged remain viable and continue to develop well after the Lab is completed. This next phase of work, which happens outside of the Lab, often involves the design and stewardship of a leadership function that attends to the system's development over time.

### **How Do We Know If A Lab Has Been Successful?**

How do we, or anyone, know that a person or group is aligned with what's emerging naturally, rather than simply pursuing a willful agenda, however narrow or noble?

In his landmark series of books, *The Nature of Order*, Christopher Alexander recounts the evidence from many disciplines for the existence of fundamental laws that govern the emergence of order throughout the universe. Alexander, an architect, contends that these laws apply to “all structures in the universe, from atoms, to crystals, to living forms, to galaxies.”<sup>4</sup> He believes these fundamental laws exist beyond the determination of culture or individual predilection, and that when human beings build or invent new forms in accordance with these laws, we *know* it. We recognize and respond as human beings to the rightness of these structures, to the *quality with no name* that underlies these structures.

In any given Action Learning Lab, and across multiple Labs, the data we currently rely on for our assertion that a “good outcome” has been achieved includes the following criteria:

- Insights, new designs and behaviors have emerged in forms and directions that were not pre-determined;
- Resulting perceptions and action have emerged in way that respected the dignity and sovereignty of those participating as well as those who will be affected;
- There is a *rightness* about what has taken shape, and a palpable sense of alignment among participants with each other and the actions they commit to take moving out of the lab;

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<sup>4</sup> See, for example, <http://www.math.utsa.edu/sphere/salingar/NatureofOrder.html>, for a brief summary of Alexander's theories.

- This knowing and action produce tangible positive results for the individual participants, for the group as a whole, for the enterprise(s) the group is seeking to influence, and for the larger ecosystem;
- The new response, design or “solution” enables its users to resolve tensions or problems that recur in particular spaces; and
- There is evidence that the person or organization can invent and incorporate new, viable responses and solutions when facing fatigue and counter-pressures exerted by an ever-changing context.

## Conclusion

The intention for this paper was to sketch an emerging understanding of the core principles and process that define Action Learning Labs, and to provide some beginning images and stories to suggest the promise of this way of working with groups. There is still much research and effort needed to realize the full potential of Action Learning Labs. It will also be important to show how this approach relates to and how it can be used in conjunction with other theories and social technologies, such as Appreciative Inquiry, Complexity Sciences, Scenario Thinking, Somatics, Theory U, and more.

Despite the work that remains ahead, those of us who have been endeavoring to create this new approach are excited by the possibility that more and more groups, in a wide array of contexts, might learn the practice of seeing what is unfolding and reaching to nurture, support and help shape it, rather than struggling to force predetermined answers into being. Our experiences over the past ten years suggest that this possibility is not mere wishful thinking, but is real, and growing. Jacob Needleman wrote of this possibility, in a letter addressed to the Fetzer Institute:

“I believe that the group is the art form of the future . . . Every great culture has created forms of sacred art that were needed in order to transmit and . . . discover by experience the truths which were necessary to absorb into one's life . . . In our present culture, as I see it, the main need is for a form that can enable human beings to share their perception and attention and, through that sharing, to become a conduit for the appearance of spiritual intelligence . . .

It takes no great insight to realize that we have no choice but to think together, ponder together, in groups and communities. The question is how to do this? How to come together and think and hear each other in order to touch, or be touched by, the intelligence we need?”

We believe Action Learning Labs are one emerging form for how to do this, for how human beings can come together in order to touch, and be touched by, the intelligence we need. We look forward to your reflections, and our continued learning together, about how to expand and deepen this human capacity for co-creativity and wisdom.

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