BUILDING NOVICE CAPACITY THROUGH ACTION LEARNING COACHING

By

ANGELA DANIELLE CARTER

(Under the Direction of Karen Watkins)

ABSTRACT

Even now, with the ever increasing pace of business and the critical need for competent human resource development (HRD) practice apparent, Watkins’ (1990) description of HRD practitioners as being ‘shoeless shoemaker’s children’ remains accurate. Novice HRD practitioners often are subject to one-sided development opportunities that are neither in keeping with these urgent business demands, nor sufficient in addressing the novices’ individual learning needs. This study, sponsored by a local chapter of Association for Talent Development (ATD), provided for this disparity with an account of personal and professional development and capacity building for novice HRD professionals through action learning coaching. Data from 10 participants were gathered from an initial questionnaire, audio and video recordings from virtual synchronous action learning set meetings using Adobe Connect, researcher observations, and post-set interviews. Participants were novices in the industry with less than 3 years of experience, and the study design was a case study approach using action learning action research (ALAR) methodology. Findings supported the use of action learning coaching as an effective tool for development, and participants reported learning facilitation skills, listening skills, and mindfulness, and incorporated them in their work.
While it is true that action learning is best undertaken with experienced facilitation, the conclusions drawn from the study indicate that learning took place even when action learning was imprecise and messy, enacted by novice action learners and their similarly noviced action learning coach. Action learning coaching enabled capacity building within the participants, who took the resultant learning back to their workplaces and lives. Finally, a conclusion was drawn from the study that implied action learning coaching—while drawing from action learning and coaching traditions—was a unique methodology that warrants further study and exploration. This research contributes to both theory and practice in the use of action learning coaching for novice development, and adds to the body of knowledge about their integration. Further work is now required to explore the impact of action learning coaching, to entertain a more vigorous study of novice HRD practitioners, and for the HRD community to provide shoes for its own.

INDEX WORDS: Human Resource Development, HRD, novice, action learning coaching, action learning, action research, Association for Talent Development (ATD), professional development
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DEDICATION

This is dedicated to those who hold a special place in my heart.

To the “little ones”: my children Kyle and Haley; my nieces Marissa, Olivia, Parker and Savannah; nephews Kamran and Marcus; ones on the way I can hardly wait to meet, Ezra, and a yet to be named niece or nephew; my Godchildren Bakari, Basha and Olivia, and might-as-well-be Godchildren Antonio, Jr., Karrington, and Worthington.

Don’t let anyone rob you of your imagination, your creativity, or your curiosity. It’s your place in the world; it’s your life. Go on and do all you can with it, and make it the life you want to live.

— Mae Jemison

To Grandmas Flossie and Rosa Mae, who inspire me every day with their strength, wisdom, and beauty; and to Nana Bernice and Mom-Mom my Grandmothers whom I miss deeply.

The most beautiful people we have known are those who have known defeat, known suffering, known struggle, known loss, and have found their way out of the depths. These persons have an appreciation, a sensitivity, and an understanding of life that fills them with compassion, gentleness, and a deep loving concern. Beautiful people do not just happen.

— Elisabeth Kübler-Ross
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CHAPTER 1
BUILDING CAPACITY: AN ACTION LEARNING CASE STUDY

INTRODUCTION

In an effort to keep pace with a progressively global, technological, and competitive business marketplace, companies rely on workplace learning as a tool for organizational survival and success (Gordon, Morgan & Ponticell, 1994; Outschoorn, 2007). As evidence of this fact, spending on workplace learning grew by 15%, to over $70 Billion in the U.S. and over $130 Billion worldwide in 2013 (Bersin, 2014), reaching its highest growth rate in seven years (Miller, 2013). This allocation of capital and commitment to human resource development (HRD) is encouraging (Davenport, 2006), but is far from altruistic. Many companies assume investments will be reciprocated through improved performance and competitive advantage (Belling, James, & Ladkin, 2004; Broad & Newstrom, 1992; Ellinger, Watkins, & Bostrom, 1999; Yamnill & McLean, 2001).

Motives aside, corporate spending on human resource development programming, among the most discretionary of all corporate spending areas, is an excellent bellwether for business confidence (Bersin, 2014). It has been suggested that effective training and development is one of the ‘seven practices of successful organizations’ (Pfeffer, 1998), and such investments are as important to individuals as to organizations (Watkins & Marsick, 2009). As such, urgency is mounting for those in HRD to address the existing knowledge and capability shortage (DeLong, 2004), and in so doing, avoid a drain of what Leonard and Swap (2004) label as "deep smarts"—the experience-based repository of tacit and explicit knowledge that allows people to understand
issues, put together patterns, and quickly come to correct conclusions. Yet even as the call is made for HRD to become the panacea for workplace learning, the development of its practitioners—specifically novice entrants—has been largely ignored despite the growing importance placed on the role.

**Human Resource Development**

When Watkins (1989) provided one of the first definitions of HRD as "the field of study and practice responsible for fostering a long-term, work-related learning capacity at the individual, group, and organizational level of organizations" (p. 427), practitioners were then guides to employee development within organizations, particularly in the areas of training and organization development (McLagan, 1989). Due to a firm grounding in relationships between people (Bierema & Callahan, 2014) HRD practitioners now take on increasingly complex problems rather than just concentrating on training programs (Gilley & Gilley, 2003; Tjepkema, ter Horst, & Mulder, 2002; Gubbins, & Garavan, 2005). Key functions of the HRD practitioner include change management, facilitating knowledge sharing and development, supporting and enhancing learning, and operating as a source of expertise for others involved in the HRD function (Gourlay, 2001; Tjepkema et al., 2000). The career development of others (McLagan, 1989) is another function of HRD practitioners, although paradoxically and perhaps symptomatic of a larger issue within the field, the practitioners themselves have been reticent to place a focus on their own professional and career development (Laird, 1985).

**Novice Practitioners**

Beginners in any new role navigate “complexity, uncertainty, instability, uniqueness, and value conflicts” (Schön, 1983), and approach new roles with varying levels of knowledge and experience (Osmond & O’Connor, 2004). Cornford and Athanasou (1995) project that mastery
of complex skills is not likely achieved in less than 5,000 hours and before 100,000 diverse problems are encountered and overall competence might not be accomplished for up to three years. Many companies report that it takes 3 to 5 years to take a seasoned professional and make them fully productive (Bersin, 2014). More specific to the novice HRD professional is the mandate to develop the essential skills and competencies necessary to train others, while making sense of a new environment (Engel-Hills & Chhem, 2012), and perhaps without benefit of the formal education or exposure to programs specifically geared toward them (Swanson & Falkman, 1997). Novices in this arena may even lack a thorough understanding of adult learning principles (Williams, 2001).

There exists a wide range of resources geared to meet developmental needs through books, papers, conferences, and courses and any number of off-the-shelf training guides for the uninitiated HRD professional. In an ideal world, novice practitioners find the proper socialization and induction in their own HRD department. However, some look elsewhere for assistance. As a means of continuing education and development, professional associations provide a way to “learn current, accurate, and highly technical knowledge requirements of their discipline, as well as balance organizational demands for applying such knowledge to variegated situations” (Rusaw, 1995, p. 216). Professional associations “ensure the quality of professional preparation and practice, to provide continuing professional education, and recognize those practitioners who take steps to improve their knowledge and practice” (Creamer et al., 1992).

One such professional association geared towards the HRD practitioner is the Association for Talent Development (ATD), whose membership delivers learning and development in the workplace. ATD, formerly ASTD, American Society for Training and Development, was established in 1944, and is a non-profit association formed to study the dynamics of the
workplace, and specifically, to propagate the advancement of the workplace HRD professional. ATD seeks as its mission to empower professionals to develop knowledge and skills successfully, and to recognize the impact learning has within a global and democratic context. (Association for Talent Development, 2014).

Ideally, ATD fosters socialization into the profession, transmits knowledge and cultural understanding, provides legitimization of credentials, and aids personal individual development (Jarvis, 1987). The association intends for learning to be derived from participation in formal activities such as conferences, workshops, and seminars, and informally through mentorships, networks, and committee participation (Rusaw, 1995). Specific features offered may depend on the particular association and the reality for this largely volunteer-based organization is that quality, timeliness, and relevance of programming can vary (Moore & Neuberger, 1998) across associations. In certain locales, activities offer quantity over quality, with the learning outcomes rarely or poorly assessed (Janosik, Carpenter & Creamer, 2006).

**Formal Training**

Investments in organizational training and development are dissipated because much of the knowledge and skills gained in training are not fully applied on the job (Broad & Newstrom, 1992). The fact remains that training is a wasted endeavor if unaccompanied by the acquisition of knowledge and skills, is not generalized to the job, and is not maintained over time (Baldwin & Ford, 1988; Broad & Newstrom, 1992; Burrow & Berardinelli, 2003; Haskell, 1998; Yamnill & McLean, 2001). There is strong evidence that formal training—the structures, and planned workplace activities that are explicitly sponsored by organizations to meet their specific, strategic goals (Bloom, 2006) is not aligned with today’s business realities that include
compressed career progression pathways, budgetary cuts and constraints, highly competitive environments, and market-driven economic philosophies (McGuire, O’Donnell, & Cross, 2005).

Management theorists have long insisted that new forms of learning, knowledge creation, and organizational change are essential for sustained success (Drucker, 1993; Senge, Schamer, Jaworski, & Flowers, 2005). The strategic nature of workplace learning compels organizations to think beyond narrowly fixating on surface-level skills that prepare people with today’s skills and competencies but not tomorrow’s (Cullen et al., 2002; Matthews, 1999; Winch & Ingram, 2002). Broad trends focus on how individuals ideally transcend their existing limits (Illeris, 2003) and how they are best aided by learning opportunities that result in professionally relevant thinking, knowledge, skills, and habits of mind that lead to changes in practice itself (Mayer & Lloyd, 2011).

There has been a growing sense that previous methods of employee development are no longer effective. Development of previously relied on technical competence may not capture enough depth and breadth to adequately prepare employees for their role. The rapid pace of change in business and industry and the increasing demand for knowledge combine to issue a call to organizations and associations who educate HRD practitioners to develop novice professionals in a way that will enable them to meet the knowledge needs of the future (Joyce & Voytek, 1996). As well, there is a clear need for early HRD professionals to learn to operate across multiple pedagogies, cultures and languages (Watkins & Marsick, 2008). Certainly, the process by which novice HRD practitioners are developed requires thought and foresight and should provide preparation beyond what they are expected to deliver (Werbel, 1995). In short, the HRD profession would do well to welcome novice practitioners who are knowledgeable and adroit.
**Action Learning**

With the potential to aid novice development, a path exists through the ongoing refinement and extension of theories concerning action learning (Mitchell, Henry, & Young, 2001) and the integration of business coaching. Action learning can be a first step for participants on a journey toward greater self-insight and capacity to learn from experience (Marsick & O’Neil, 1999). Not an organizational fad, but a process with a long and rich history, (O’Neil & Marsick, 2007) action learning is conceptualized a way to work with and develop people that uses real problems in the workplace to learn (Yorks, O’Neil & Marsick, 1999).

Working in small groups, the individual, with the help of the group, works through the problem together. The individual takes action on the problem and everyone learns how to learn through the process. Learning coaches often facilitate the learning and “help the members learn how to balance their work with the learning from that work” (p. 3).

Action learning allows novice individuals the ability to deal with rapidly changing environments and enables them to use critical thinking skills (O’Neil & Marsick, 2014, p. 218). Development in the areas of “leadership skills, interpersonal skills, empowering skills, facilitation skills, problem solving skills, and the capacity to cope with change” (Choi, 2005 p. 45) is achieved through this methodology. According to Raudenbush and Marquardt (2008), action learning yields benefits such as increased empathetic listening, and an enhanced ability to formulate informed actions and a higher readiness to take responsibility and initiative.

In a New Yorker article, Gawande (2011) pronounced, “no matter how well trained people are, few can sustain their best performance on their own. That’s where coaching comes in” (p. 44). Coaching is considered the new face of leadership for the 21st century (Marsick & Maltbia, 2009). In the workplace, coaching involves helping on various levels of a team’s work,
including the task, project, process, or team dynamics level of the team’s interaction (Reddy, 1994). For O’Neil and Marsick, (2014) melding action learning with coaching takes it to another level—that of learning-how-to-learn” (p. 206). Action learning coaching raises relational abilities and increases consciousness in order to help participants “know themselves better, live more consciously, and contribute more richly” (Sherman & Freas, 2004, p.85).

**Problem Identification**

The growing importance of lifelong learning places an increasing focus on training and the development and the recognition of work based learning (Attwell, et. al, 2008). With this acknowledgement comes the urgent need for well-developed HRD professionals. At the same time, traditional structures and systems for the development and induction of novices into the field of HRD have failed to keep pace (Attwell, et. al, 2008). Previous studies have shown that such development activities are inconsistent and fragmentary (Brown, 1997), and further that novice HRD professionals are offered little in the way of capacity development beyond basic induction. Novice HRD professionals are not only mandated to take charge of the development of others using adult education principles, but they must also take charge of their own learning (Driscoll, 1998). Although continuing learning is an obligatory part of a professional's role (Smutz, Crowe & Lindsay, 1986), these new entrants are often left to navigate professional development alone. Some support is available, albeit from organizations and professional associations that rely on older models of training that neither develop knowledge and understanding at the appropriate time, nor based on immediate felt needs (Lewis & Williams, 1994, p. 11). This study acknowledges the lack of adequate induction and development for novice HRD practitioners, and offers a method that blends action learning and business coaching methodologies in order to build future capacity.
Purpose of the Study

The purpose of this study was to explore the use of action learning coaching as a means of personal and professional development for novice HRD practitioners. Additionally it was important to gain an understanding of the common problems novices in this field face to ascertain what they learned from participation, and determine how, if at all, novice HRD professionals apply that learning to their workplaces, their professions, and their lives.

Guiding Questions

Three key questions guided the study and provided for the exploration of relationships between action learning coaching and the professional development of novices in the human resource development field:

1. How do novice human resource development practitioners construct the challenges they face in their new roles?

2. How do these novices make meaning of their participation in action learning coaching?

3. What systemic changes will they make in their professional practice as a result of participation in action learning coaching?

Conceptual Framework

The two main constructs for this study were novice practitioners and learning. The conceptual framework concentrated on the use of action learning coaching as a process to facilitate novice learning and capacity building. The framework that influenced and guided this study consisted of several conceptual elements, including novice professional competency, action leaning coaching, and the theories of informal and incidental learning. Figure 1 provides a conceptual view.
New HRD professionals must ultimately develop into competent professional practitioners. When encountering problems in the workplace that seem immutable and insurmountable, the novice may not know how to handle them. Action learning and coaching allows for the development of deep reflective practice, engaged questioning, learning through others’ learning and taking action. Reflecting on the outcome of the case, novices make meaning of the experience, and learn informally and incidentally in the process. The development of a solution draws on the skills of identifying and analyzing experience, reflection and feedback (Gray, 1999). The novice is better able to articulate tacit and practice knowledge, thereby building capacity. As the novice navigates their workplace, develops others, and finds new problems to solve, the novice is more adequately prepared to withstand the personal, professional, and organizational challenges confronting them.

**Methodology in Brief**

The methodology used in the study consisted of a case study approach (Yin, 2003) using action learning action research (ALAR) that explored the experience of two cohorts of 10 participants. A questionnaire was used to gauge the initial problems experienced by the novices, and action learning set participation was facilitated through Adobe Connect in a virtual, synchronous environment. Semi-structured post-set interviews captured the learning outcomes.
of novice participants who used real workplace problems to explore the challenges of being novice human resource development practitioners.

**Potential Significance of the Study**

This research adds to the body of knowledge on using action learning coaching for the personal and professional development of novices, specifically considering the HRD professional. The novices’ use of this particular methodology may bolster learning, transfer to practice, and build capacity for current and future roles. Examining the experiences of the ten novice participants has the potential to deepen our understanding of action learning and draws out the nuances of adding coaching as an analogous approach. This study considered the influence of action learning on informal and incidental learning, and documented its intersection with human resource development (Cho, 2013).

**Organization of This Dissertation**

Already offered in this chapter was the study’s underlying foundation through the problem statement, guiding questions, methodology in brief, and conceptual framework. Below, I offer a brief description of the content contained in subsequent chapters and the organization of the remainder of the dissertation. Chapter 2 provides a review of relevant literature as connected to the study’s tenets and conceptual framework. Chapter 3 offers a detailed explanation of the research design and methodology, while Chapter 4 presents the story of the research study using a single case action learning action research approach. Chapter 5 explores findings and recommendations met through the coding of data and resultant analysis, and finally, Chapter 6 provides a summary of the study, draws conclusions, and offers reflections and recommendations for future areas of inquiry.
CHAPTER 2

LITERATURE REVIEW

This qualitative action research case study investigated action learning coaching as an approach to personal and professional development for novice Human Resource Development (HRD) practitioners. The research study contained three overarching questions that asked: (1) How do novice HRD practitioners construct the challenges they face in their new roles? (2) How do these novices make meaning of their participation in action learning coaching? (3) What systemic changes will they make in their professional practice as a result of participation in action learning coaching? Yin’s (2014) advice to researchers is to give serious thought to their case study’s connectivity to the literature. As such, this chapter shows links between the study’s constructs to literature relating to novices in the workplace, informal and incidental learning, tacit knowledge, and application and learning transfer through action learning coaching.

The chapter is divided into three sections. In the first section, I examine literature on novice HRD professionals specifically, and then how novice professionals in general develop in the workplace though models of stage progression and competency development. In the second section, I review informal and incidental learning and tacit knowledge creation, which are naturally occurring but hidden learning practices that once made explicit could aid novices in their progression to competency. In the third section, literature on action learning and coaching and then the combination of the two, action learning coaching, is examined as a means to facilitate the articulation of tacit knowledge and transfer to practice in order to build novice capacity.
Novice Professionals

Novices are on a continuous journey of becoming (Engel-Hills & Chhem, 2012) and must make sense of a new environment in order to develop the skills and competences required for their new roles. Aspiring professionals must first acquire basic knowledge and skills relevant to their chosen profession and later accumulate advanced knowledge and skills through formal and informal training (Dall’Alba & Sandberg, 2006). Literature concerning the novice and their development through stages is vital to understanding the path to becoming effective employees.

Novice Human Resource Development Professionals

Since the development of modern HRD practice, there have been numerous calls to fix corporate training (Haskell, 1998), produce results (Swanson & Holton, 1999), move from training to performance (Robinson & Robinson, 1998), and address the increased demand for trainers and training functions in business (Holton & Trott, 1996; Mager, 1996; Manz & Sims, 1995; Robinson & Robinson, 1995). In response is conformation that the types of learning that occur in the workplace are more complex than previously considered. The HRD practitioners themselves experience changing education and development needs (Robinson & Robinson, 1998) and require additional skills to prepare, develop, and deliver effective workplace learning (Cornford & Bevan, 1999). Despite this, relatively little has been published on ways to fill this learning need and there is scholarly dissention about the ways in which novices best gain expertise that include actionable, proven, and practical techniques (Swanson, 2007) for dealing with gaps in knowledge.

Much of the genre’s early literature focused on external attributes such as levels of expertise, roles and responsibilities, and planning instruction. Suitable qualifications and experience for the role (Gauld & Miller, 2004), and defining distinguishing characteristics and
competencies for trainers (Leach, 1996) were most often studied. Swanson and Falkman’s (1997) study, for example, focused on trainers in their first two years of practice. However, instead of development needs, the study concentrated on trainer characteristics and did not examine the optimal internal development required by those who would offer training for others.

More recently, attention has been shown to HRD education within higher education contexts. Though different in focus, there is enough similarity in curriculum and training for the burgeoning HRD student that the studies could provide relevance for HRD professionals in practice. Outcomes of several studies have shown the benefits of incorporating reflection into HRD courses in U.K. universities, including a deeper understanding of the subject matter and better transfer of learning from the classroom to the workplace (Francis & Cowan, 2008; Holden & Griggs, 2011; Lawless, Sambrook & Stewart, 2012; Sambrook & Stewart, 2008). The use of role-play in HRD coursework has been characterized as innovative (Morse, 2010; Wootton & Stone, 2010), and project-based learning has been used in HRD courses (McKinlay, Grogan, Sedakat, & McKinlay, 2010; Anderson & Gilmore, 2010). Gardner and Korth’s (1997) use of group work, reflection, and project work acknowledged that learning can transfer from classroom to the workplace, while there is evidence that work-based learning improves students’ understanding of HRD content (Morse, 2006; Shaw & Ogilvie, 2010). This literature shows that adding alternate methods of instruction can speed transfer to practice for students taking HRD courses. Finding the proper tools to affect learning for students in the preprofessional stage and soon to enter practice would provide a fairly accurate assessment of the needs of novices already in practice.
Empirical Studies on Human Resource Development Practitioners

A key function for the new HRD practitioner is in learning, assimilating, and absorbing knowledge that they then must convey to others. Spear (1988) examined corporate trainers’ use of self-directed learning to develop training programs in which they possessed limited prior knowledge. In the study, he found that HRD professionals needed an adequate level of proficiency before being able to instruct others (Spear, 1988). Other studies have considered how new entrants manage this complexity when they are new to a role and oftentimes the subject. Hutchins, Burke, and Berthelsen (2010) investigated how new HRD professionals used extant research to develop their practice, in this case, in acquiring knowledge of training transfer. One finding in the study determined that training professionals seek information through informal learning methods. In other words, they utilize methods that are outside of formal contexts. Additionally, Rynes, Colbert, and Brown (2002) explored how HR professionals sought information to solve job-related problems. The study’s findings indicated that human resource professionals drew upon informal learning methods in order to obtain needed information and to solve job-related problems. Another study argued for more rigorous preparation of HRD practitioners, specifically advocating on behalf of mentors. Mentoring is one of the duties ascribed to HRD practitioners. A study of workplace mentoring conducted by Billett, McCann, and Scott (1998) found that part of the process to prepare mentors for their roles ideally should include monitoring, review and opportunities to refine skills (p.68).

Progression From Novice To Expert

The expert to novice continuum is a collection of well-known theories that have been studied extensively in new nurses (Benner, 1982, 1983, 1984; Benner & Tanner, 1987; Daley, 1999), K-12 teachers (Marshall, Fittinghoff, & Cheney, 1990; Feiman-Nemser & Remillard,
1996; Huberman, 1989), physicists (Chi, Feltovich, & Glaser, 1980), and airplane pilots (Dreyfus & Dreyfus, 1985) to ascertain movement toward competence and eventual expertise. Dreyfus and Dreyfus led the genre with their model that posits the acquisition and development of a skill is acquired through students passing through five levels: novice, competent, proficient, and expert (Dreyfus & Dreyfus, 1980) (see fig. 2).

The Dreyfus (1980) model starts with a student who has little experience with the subject. Development is reached through progressive stages of task accomplishment. At first, the novice relies on strict adherence to rules given to them through a mentor or through formal training, improving in the task through monitoring, feedback, and self-correction. Through a mixture of practice and repetition in real situations the student moves to the next stage, competency. Proficiency comes as increased practice exposes them to a wide variety of potential experiences, and expertise is gained when the aforementioned rules are no longer needed by the student, replaced with improvisation, and ingrained intuition. The student gains mastery when as an expert she no longer needs to rely on rules or place conscious focus on monitoring performance (Dreyfus, 1980).

Criticism from Gobet and Simon (2000) was leveled at the Dreyfus model with the idea that intuition should play a much more important role in developing expertise. Cheetham and Chivers (2005) acknowledged that while the development of expertise does include intuition at its higher levels, “in practice this mixture is likely to vary from task to task and indeed individual to individual” (pg. 164). Indeed, stage models show eventual progression, but little is offered in the way of how the novice attains each level.
There are several arguments against using a strict interpretation of the novice progression in a tiered manner. At any given time in the workplace, novices are exposed to many different practices and can be skillful in one area but not another (Billett, 2001; Borko et al., 1997; Mol, 2002). In this purview, practitioners can be both novices and experts in different areas at the same time. Another reaction against placing the novice in the conforming structure of stage models is the idea that being a novice and moving towards greater ways of knowing is an iterative process that is both individual and situational (Martinovic, 2009). Although these stages are divided artificially, some intersection between the stages would be expected where there are a number of skills being learned at the same time (Cornford & Athanasou, 1995). Finally, stage models seem to infer that expertise can be gained by all who attempt the skills. On the contrary, even though all people are capable of achieving some improvement in skill not everyone is capable of becoming an expert or even proficient (Cornford, 1992).
Empirical Studies on the Novice Continuum

Empirical tests of novice stage models have sought evidence of representations of successively higher levels of knowledge and skills acquisition in fixed sequences (Dall’Alba & Sandberg, 2006). Other stage theorists posited similar linear progressions, such as Feiman-Nemser and Remillard’s (1996) empirical study based on stage models of teacher development. The study used three stages to represent the progression to expertise and noted that novices tend to put forward "an initial stage of survival and discovery, a second stage of experimentation and consolidation, and a third stage of mastery and stabilization" (p. 66).

Benner (1982) developed a novice to expert model in a nursing context that encompassed five stages: novice, advanced beginner, competence, proficiency, and expertise. Findings of the study acknowledged the presence of a tiered process to competency and indicated that novice nurses were not as able to use intuition to grasp situations, nor were they facile in their ability to locate the problem quickly without wasting time (Benner, 1982). Benner concluded that ‘‘expertise takes time to develop’’, and noted that expertise “is neither cost-effective nor practical to try to teach in formal educational programs” (Benner, 1984, p. 184).

In another study of novice nurses, Daley (1999) found that novice nurses tended to learn formally, seeking to follow policy or procedures, attending continuing education programs and reading journals since they had little real application of experience. Daley’s findings showed that educators could be important mediators of the novice to expert continuum, and that flexibility, adaptability, and diversity in methods of facilitation could be enabling and supporting factors for novice learning. Neither Benner’s nor Daley’s studies proposed that novices have the ability to circumvent the novice to expert continuum, but both studies seemed to confirm that
formal learning should not be the only method of instruction to facilitate novice learning and movement towards expertise.

As applied to HRD, Grenier and Kehrhahn (2008) felt that developmental stage models generally fell short in explaining what influences novice learning at each stage of development. In a study of new HRD practitioners, they found that HRD professionals must develop competencies, learn new roles, and assimilate into the industry. Since HRD practitioners often find themselves in different situations and contexts that require expertise that is adapted to fit new parameters, new scenarios, and new challenges, it was proposed to replace stages with territories. Stage level representations of how novices might progress in their level of skill to become experts present a plausible, but limited view.

**Informal and Incidental Learning and Tacit Knowledge**

Informal learning is in contrast to formal learning, which is structured, often takes place in a classroom environment, occurs in the absence of action, and removes learners from the work setting to engage in lectures, discussions, simulations, and other instructional activities (Watkins & Marsick, 1992). Instead, informal learning grows out of everyday encounters (Marsick & Watkins, 2001) is flexible, highly adaptable, and allows for the rapid transfer to practice and resolution of work-related problems (Dale & Bell, 1999). A subset of informal learning, Marsick and Watkins (1990) defined incidental learning as a byproduct of some other activity, such as task accomplishment, interpersonal interaction, sensing the organizational culture, trial-and-error experimentation, or even formal learning (pg. 12). Tacit knowledge refers to knowledge that has not been formalized or made explicit (Zander & Zander, 1993), but that can be articulated by actively creating and organizing experiences (Polanyi, 1966).
Informal Learning

Research on informal learning began appearing in the literature in the 1980s (Edwards & Usher, 2001). Since then, the ubiquity of informal learning is well established in the literature as comprising the majority of workplace learning and forming part of everyday work activities (Fox, 1997; Leslie, Aring, & Brand, 1998; Bell & Dale, 1999; Lohman, 2000; Enos, Kehrkahn, and Bell, 2003). Both action and reflection are seen in informal learning (Watkins & Marsick, 1992) and “self-directed learning, networking, coaching, mentoring, performance planning . . . and trial-and-error” (p. 291) occur as the result of individuals making sense of experiences they encounter during their daily work lives (Marsick & Volpe, 1999). Consultation or advice seeking from peers or from wider contacts such as professional networks, suppliers, and customers (Eraut, Alderton, Cole, & Senker, 1998) are also forms of informal learning.

Informal learners have a degree of awareness, intention, and direction in their own learning (Marsick, Watkins, Callahan & Volpe, 2009), although they might not always realize the need to learn on their first attempt to solve the problem (Marsick, Watkins, Callahan & Volpe, 2006) and are often unaware of the significance, range, and depth of what they have learned (Hager, 1998). The unstructured and sometimes unintentional nature of informal learning is what helps novices transfer the first training lessons to the job, may increase the range of tasks learners can handle, and determine how efficient and effective they are at doing so (Carlinger, 2012). Learning informally may ultimately benefit newer employees as they grow in their careers. As novices outgrow initial roles, they can take what they learned informally to identify possible new jobs and begin the process of preparing for them (Carlinger, 2012).
Incidental Learning

Incidental learning is sometimes used interchangeably with informal learning (Le Clus, 2011), constitutes the unintentional activities that occur as a by-product of everyday experiences (Marsick & Watkins 1990), and almost always takes place although people are not always conscious of it (Watkins, 1990, p. 12). Incidental learning is not purposeful or premeditated but rather occurs when the individual is unaware and does not anticipate learning will occur (Konetes, 2011). In the literature, incidental learning is shown as unplanned (Tusting 2003), unintentional (Marsick & Watkins 1990, Bell & Dale, 1999), and not formally recognized (Bell & Dale, 1999). It would seem that the ability to transfer problem-solving skills to real world applications might be incidentally acquired by learners (Crawford & Machemer, 2008).

Tacit Knowledge

Tacit knowledge is gained as a result of learning informally and incidentally through experience (Ravetz, 1971; Le Clus, 2011). Both personal and context-specific, tacit knowledge is not easily expressed nor easily formalized or communicated to others (Polanyi, 1966). Everyday tasks as well as those at work are rife with occasions where more is known than can be articulated, and in order to become explicit, tacit knowledge needs to be converted into words, numbers or pictures that can be understood by others (Polanyi, 1966). Literature in the tacit skill development category has concentrated on definition (Polanyi, 1967; Molander, 1992), knowledge management (Johnson & Lundvall, 2001) work process knowledge (Kusterer, 1978, Le Plat, 1990), situated cognition (Lave & Wenger, 1991), informal learning (Eraut, 2000), and organizational knowledge creation (Nonaka & Takeuchi, 1995).

While much of the research involved in the study of tacit learning and tacit dimensions of competence has been conducted in those already deemed to have expertise in an area, there are
implications for strengthening novices through the creation and elicitation of tacit knowledge. However, there are problems in extracting tacit knowledge. Either the individual knows but cannot tell (Polanyi, 1967), which is more of an expert problem, or the individual must learn to tell (Eraut, 2000), which is a novice issue. An approach for making the tacit explicit is to either “facilitate the ‘telling’ or to elucidate sufficient information to infer the nature of the knowledge being discussed” (Eraut, 2000, pg. 119).

The benefits to making the tacit learning process explicit are significant. The individual is helped to not only recognize and value his or her achievements, but also to gain the personal identity of being a member of society committed to lifelong learning (Gray, 2004). This allows for the sharing of skills and knowledge that opens up new platforms for learning and new pathways emerge “linking tacit and explicit dimensions which create expanding horizons for learning” (Evans, 2000). Facilitating the elicitation of tacit information that comes from personal knowledge and experiences “can lead to the internal construction of values and beliefs, and by extension affect reactions and behaviors” (Falconer, 2006).

**Empirical Studies on Informal, Incidental Learning and Tacit Knowledge**

Several studies have shown that informal learning methods facilitate the creation and sharing of knowledge at work. Enos, Kehrkahn, and Bell’s (2003) study centered on the role informal learning played in developing managerial proficiency and found that 70% of the learning activities were identified as informal. Line managers in Beattie’s (2006) study reported that coaching, sharing task-specific knowledge, reflective thinking on performance, discussion, and guided activities were the primary learning methods.

In a study that involved 80 practitioners from 20 fields and 6 professions, Cheetham & Chivers (2001) determined that much of the learning for those newly in practice takes place after
formal training and is informal in nature. Findings from an interview study of forty-two North American and European companies, HRD practitioners who were measured on the impact of informal learning reported an increased use of informal learning integrated with work activities. As a result, informal learning was supported by spending more time in solving real business problems (J. M. Huber, 2002). Lohman’s (2005) study on the learning preferences of human resource development (HRD) professionals found that participants had a penchant for using self-directed informal learning activities, including observing others, searching the Internet, and scanning professional magazines more often than teachers. Ultimately, one of the most important skills borne of informal learning practices is to make appropriate judgments in the changing and often unique circumstances that occur in the workplace (Hager, 1998). A study of apprentices in carpentry and car repair found that apprentices learned informally by embedding learning into their lives. This method of learning was rated higher than formal learning opportunities that were deemed inconvenient and out of step (Unluhisarcikli, 2001).

As for incidental learning, Webb (2008) illustrated how incidental learning may occur as a byproduct of focused intentional learning. An individual who reads a book to obtain content knowledge obtains knowledge of new words and their context thereby incidentally developing their vocabulary. A Swanborn and De Glopper (1999) study reinforced this example in their finding that students learn approximately fifteen percent of words that they encounter while reading that were previously unfamiliar. Many of the empirical studies on incidental learning focus on the social nature of incidental learning. In Van den Tillaart, Van den Berg and Warmerdam’s (1998) research, employees were able to maintain skills and qualifications with help from more experienced peers and through problem solving. Both Astin’s (1977) and Mealman’s (1993) studies found that university students learned incidentally by nature of being
on campus and interacting with peers. Collaboration with others is a prime situation for incidental learning (Amelung, Laffey, & Turner, 2007).

Tacit knowledge is also acquired informally and incidentally. Evans, Kersh and Kontiainen, (2004) reported that in new workers, the recognition and deployment of tacit skills could be harnessed to strengthen learning success and outcomes in new working environments. As opposed to Viljoen, Holt, and Petzall’s (1990) study with experienced managers who could not formulate a cohesive explanation of their own knowledge and skill, novices could be bolstered by their ability to articulate and share tacit knowledge. Ironically, one of the most fitting empirical studies about tacit learning was Hoffman’s (2008) study derived from interviews with 33 adults who were out of work. The study focused on the elicitation of tacit forms of key competencies in informal learning situations. The study examined people’s degree of awareness about their development of skills, competencies, and knowledge, how they experienced and valued the development of tacit knowledge. Findings showed participants gaining confidence, awareness, outlook on life, and self-efficacy through the articulation of tacit practice knowledge.

**Action Learning Coaching**

The use of action learning and business coaching as an integrated practice actually has roots in business literature as far back as the 1950’s (Ellinger, 2014). To date, research has heavily favored an action learning approach used by leadership development programs and teams within organizations to solve larger business or team-based issues. Many studies have advocated the use of action learning for professional development. At the same time, coaching in the workplace has grown in popularity with a similar focus on individual development. Recently, the incorporation of coaching with action learning has begun to gain traction in scholarly circles,
though with little practical application. I begin this section by presenting and defining action learning and coaching, each individually. The final section in the chapter provides discussion and empirical data that supports the integration of the concepts into the practice of action learning coaching.

**Action Learning**

Action learning began in the 1940’s and is attributed to Reg Revans, who introduced the method as a means of intellectual or emotional development. Action learning requires its subjects though responsible involvement in some real, complex, and stressful problem to achieve intended change to improve their observable behavior (Revans, 1982, p. 626-627). The use of action learning is well established for organization change strategy, and organization and leadership development (Boshyk, 2002; Marquardt, Leonard, Feedman, & Hill, 2009; O’Neil & Marsick, 2007; Raelin, 2009; Pedler, 1991; Dilworth & Boshyk, 2010). Previous reviews of action learning literature focused on categories such as gathering and exploring accounts of practice and examples of application (Mumford 1994), theoretical schools (Marsick & O’Neil, 1999), action learning steps (Pedler, 2003; Marquardt, 2004), and distinguishing between action-oriented, learning-oriented and balanced action learning practices (Cho & Egan, 2009). Variations exist as well, including business-driven action learning, auto action learning, self-managed action learning, virtual action learning, network action learning and critical action learning (Pedler, Burgoyne, & Brooks, 2005; Cho & Egan, 2009).

Revans’ (1998) famous quote, “there can be no learning without action and no sober and deliberate action without learning” (p. 83) evidenced his notion that action and learning were intrinsically connected. The requirement that set members take action on their problems was one
of Revans’ most important tenets. Pedler, Burgoyne, and Brook (2005) note that Revans’ classical approach to action learning contains six important principles:

- A requirement for action as a basis for learning.
- Profound personal development results from reflection upon action.
- Problems have no right answers, and are not puzzles that are susceptible to expert knowledge.
- Problems are sponsored and aimed at organizational as well as personal development.
- Action learners work in sets of peers (‘comrades in adversity’) to support and challenge each other.
- Fresh questions and questioning insight are superior to expert knowledge (p. 58-59).

Noticeably missing from Revans’ formula is a reliance on an action learning coach. In fact, Revans was adamant that the initial facilitator give way to the group process (Pedler, & Abbott, 2008). Revans felt reflection was a fundamental component in participants’ learning and did not want a group hampered or dependent on a coach (Johnson, 2012). Factions have surfaced within action learning that are split geographically, with the US model providing more structure within the set as compared to its European and UK counterpart (Brook, Pedler & Burgoyne, 2012), and in contrast to Revans’ model above mainly in its embrace of a learning coach to facilitate the process. Marquardt (2004), Dilworth (2010), Marsick and O’Neil (1999) are all enthusiastic ambassadors of the coaching aspect of action learning.

There is also great debate within action learning circles that the field has strayed too far from Revans’ original conception, which has led to criticism being leveled at the various approaches. Part of the dispute lies in the fact that Revans did not have a pure definition of action learning, instead defining what it was not (Pedler, 1997). Marsick and O’Neil (1999) remarked that “the very simplicity of its core ideas leaves it open to many interpretations. Revans . . . typically decries models that stray too far from his conceptualization, but healthy experimentation and critique help it grow” (pg. 160).
In keeping with the self-help and individualization movement that has occurred over the past 30 years, current action learning trends have changed. Cho and Egan (2009), in their comprehensive review of action learning research from 2000 to 2007, found that many studies favored either action or learning over Revan’s insistence on a “conceptual and practical balance between action and learning” (p. 434). The implication from many fronts is that personal development should flow from engagement with organizational problems, though interestingly, action learning is used with greater frequency for personal development than for organizational growth (Cho & Egan, 2009). In individual project action learning, members divide the time among themselves, and each person is helped by the others to think differently about the situation, the proposed solutions, and the results from any action that is taken (Marsick & O’Neil, 1999).

Others take issue with the assumption that individuals can easily transfer learning from one context to another (Pedler, 1997) and that action learning is devoid of context. In fact, the very opposite seems to be true. The highly contextual nature of action learning means that the messier and more ‘wicked’ the problem, the more individuals are apt to participate dynamically and engage in questioning, feedback, and reflection (Fenwick, 2003; Marquardt & Yeo, 2012). As learners take part in the methodology, their prior, existing, and perceived experiences add context that shape their own mental models, affect attitudes, and enact new action patterns (Kayes, 2002; Senge, 1990).

Finally, some say that action learning should be used solely as a group level process, as envisioned by Revans. Pedler, Burgoyne and Brooks (2005) confirm that in practice, action learning has become more focused on personal development and less centered on organizational problems. The problems chosen for individual projects are likely to be those with personal
significance, that upon discussing within sets would offer the action learner the ability to expand their capacity for learning, apply learning to new problems, and develop skills associated with how better to learn from their experiences (O’Neil & Marsick, 2007). Profound personal development may be realized from reflection on action (Pedler et al., 2005) and a pragmatic focus on learning for more effective action (Marsick & O’Neil, 1999).

**Empirical Studies on Action Learning**

Action learning can leave participants better fortified for dealing with future problems and bolsters their abilities. A study by Stark (2006) looked at continuing professional development within action learning sets for two different occupations: one for nurses and one for educators. The findings were that action learning helps individuals more easily cope with change that occurs in their lives. Similarly, in a study of professionals in the USDA, Raudenbush and Marquardt (2008) found that action learning increased listening skills, and increased participants’ decision-making, responsibility, and initiative. Cowan (2013) used action learning in a leadership development study to show that participants learned incidentally and developed confidence and self-efficacy. Participation can also build professional acumen in individuals involved in action learning sets. Harris’ (2012) study established that individuals engaging in the action learning method learned through shared ownership of others’ problems within the sets and augmented their professional practice.

**Coaching**

Over the past 50 years, various forms of coaching in the workplace have emerged, including executive coaching, peer coaching, developmental coaching, and business coaching. Hamlin, Ellinger and Beattie’s (2008) review of the differences in the definitions revealed few substantive differences between the variants of coaching as related to their fundamental purposes
and processes. However, business coaching conceived as “…a solution-focused, result-oriented systematic process in which the coach facilitates the enhancement of work performance and self-directed learning and personal growth of the coachee” (Grant 2001, p. 8), is the most fitting in the context of the present study. According to Bacon and Spear (2003), business coaching is an informal dialogue that facilitates new skills, possibilities, and insights in the interest of individual learning and organizational advancement. Despite the fact that Bartlett (2007) holds coaching as one of the fastest growing techniques for HRD, there seems to be some confusion from practitioners and scholars alike over exactly what coaching is, how it helps the coach and coachee.

ATD’s 2013 Competency Model™ calls coaching “a systematic process to improve others’ ability to set goals, take action, and maximize strengths” (ASTD.org, n.d.). As a practice within Human Resource Development, coaching “involves structured, focused interaction and the use of appropriate strategies, tools, and techniques to promote desirable and sustainable change for the benefit of the coachee and potentially for other stakeholders” (Bachkirova, Cox & Clutterbuck, 2014, p. 1). Contentions are leveled that coaching is atheoretical (Ellinger, Hamlin, & Beattie, 2008), is scattered in terms of its assorted theories, and that it is empirically immature, especially as applied within human resources (Ellinger et al., 2014).

When used to bolster individuals (Ellinger et al., 2014), coaching fosters learning skills that include communication, listening, clarifying, questioning (Cox, 2013), goal setting (David, Clutterbuck, & Megginson, 2013), and relational skills (Ladegårård, 2011; Moen, 2011; Slåtten, Svensson, & Sværi, 2011; Wasylyshyn, 2003). Moreover, individuals are prone to make free and informed choices based on information provided by coaches (Witherspoon, 2000, pg. 167).
There is evidence that coaching has direct and indirect effects of behavior on employee role clarity, work attitudes, and performance (Kim, et. al., 2013).

When paired with action learning, coaches help facilitate individual learning by assisting in making meaning of the sessions by asking questions, providing feedback and challenging assumptions (Waddill & Marquardt, 2003). Relationship building is fostered through the facilitation and negotiation of meaning with the learner (Merriam & Caffarella, 1999, p. 264). Through questioning, the coach elicits reflections from group members as to how they listen, how they might reframe the problem, how they give each other feedback, how they are planning and working, and what assumptions may be shaping their beliefs and actions (Marquardt, 2004). In turn, individual empowerment and trusting relationships can be formed.

**Empirical Studies on Coaching**

There are but a few studies on managerial coaching (Gilley et al. 2010), and even fewer empirical studies of managerial coaching exist that show outcomes that have conclusive results (Beattie et al. 2014, p.188), and that contain employee responses to coaching (Lynch, 2014).

Drawing on the tacit literature perused above, Blow (2005) used a phenomenological study with action research as a shadow process to analyze whether coaching could allow experts the ability to articulate tacit knowledge and describe intuitive information. The study found that by deliberately setting time aside and offering coaching support based on insightful questioning, that “coaching strategies could indeed help some experts to think more clearly about their own intuitive knowing and unconscious competence” (pg. 14). Lamm (2000) looked at coaching using a transformative learning lens from the learner’s perspective to ascertain which leadership behaviors were most likely obtained through participation. Using a sample of 24 learners and a corresponding number of coworkers, the study found that participants learned self-
understanding, inclusiveness, and reflective action. In addition, the findings showed that the participation fostered multiple new awarenesses, verification, support, and practice. Though centered on experiential learning theory, a Cox (2013) study found that as a process, coaching facilitates understanding, provides direction, and supports action and integration of experiences, concepts, and observations.

**Action Learning Coaching**

Even though action learning and coaching emerged from separate traditions, they share commonality within HRD literature. It is likely for action learning scholars to mention coaching within their works, and for coaching scholars to advocate action learning as a method to employ in practice. Fazel’s (2013) *Learning Theory Within Coaching* listed action learning as one of the coaching theories examined. For Passmore and Fillery-Travis (2011) the ability to differentiate coaching from action learning was impossible, and beyond the scope of their article, as each were too close to distinguish usefully between them. O’Neil and Marsick (2014) have long advocated for coaching to have a greater presence within action learning sets, and describe action learning coaching as “another type of leadership coaching that takes place in many organizations that choose to use action learning as a vehicle for leadership development” (pg. 203).

**Empirical Studies on Action Learning Coaching**

Despite the pairings in HRD literature, there is scant acknowledgement on the use of action learning coaching as an integrated practice. As described above, in coaching literature action learning seems to be used as an illustration of one type of coaching that could be used to develop individuals. Within action learning literature, the idea of coaching more often than not refers to the coaches themselves. Yet, as Table 1 depicts, there is a small but growing interest in the packaging of the two concepts as a methodology.
Table 1 Empirical Table of Action Learning Coaching Literature

<table>
<thead>
<tr>
<th>Lead author (year)</th>
<th>Purpose</th>
<th>Sample</th>
<th>Research Methods / Study Design</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaartjes (2005)</td>
<td>How can action learning practices impact the executive coaching engagement</td>
<td>4 senior managers of a technical support organization</td>
<td>Case study</td>
<td>Action learning practices can strengthen the form and structure of the executive coaching engagement.</td>
</tr>
<tr>
<td>Abbott (2006)</td>
<td>To explore how executive coaching utilizing action learning can facilitate expatriate acculturation.</td>
<td>10 expatriate managers utilizing executive coaching and action learning</td>
<td>Multiple case study action research design</td>
<td>Coaching seemed to help them navigate the uncertainty and complexity of their cultural and professional environments, and contribute to improved work performance and enhanced personal satisfaction.</td>
</tr>
<tr>
<td>Baron &amp; Morin (2009)</td>
<td>To determine the impact coaching has on the coachee</td>
<td>31 coach-coachee dyads</td>
<td>One group pretest-posttest design</td>
<td>Provided a mechanism to include action research, action learning, and coaching in the creativity and innovation processes</td>
</tr>
<tr>
<td>Sankaran &amp; Brown (2012)</td>
<td>To explore whether a group coaching methodology could promote design thinking, innovation and collaborative creativity</td>
<td>9 leaders in healthcare</td>
<td>Micro example of a workshop utilizing action learning coaching</td>
<td>Action learning coaching was a useful framework for organizations to improve the capability of their managers in addressing wicked problems</td>
</tr>
</tbody>
</table>

Vaartjes (2005) started the movement with a case study to show how the application of action learning practices can strengthen the form and structure of executive coaching engagement. Findings showed that action learning emphasizes the achievement of tangible business outcomes, and coaching seeks to develop the individual’s capacity for learning through reflective and inquiry-based practices. Findings showed that when delivered within a supportive,
client-centered coaching framework, such integration can support rigor, theoretical depth and the achievement of intangible and tangible outcomes.

Abbott’s (2006) doctoral thesis built upon Vaartjes’ work. In using action learning coaching to facilitate expatriate acculturation to El Salvador, the study sought to understand how well action learning coaching prepared fifteen expatriate managers to face the challenge of acculturation. Action learning coaching provided the expats a means to develop reflective practice in order to better-understand themselves and their contexts. As well, the participants were provided a medium to transfer and apply knowledge. While the first two studies looked at the individual impact on coachees, Baron and Morin’s (2009) study sought to understand the coach and the coachees’ relationship. Their purpose was to determine how coaching integrated with three different training methods—one of which was action learning—affected participants and the coaches with whom they were matched. The researchers found that just having a coach raised the coachees’ perception of the experience and desire to persist. Positive working relationships with the coach aided transfer and motivation to continue the process because of their learning. The coaches reported similar feeling of self-efficacy with regard to facilitating learning outcomes.

Although not a quantifiable study, Sankaran and Brown’s (2012) micro case study provides utility in showing a different view of action learning integrated with coaching. In using group coaching methodology based on action learning to help managers improve their capability in addressing wicked problems and how to think more strategically. Solving wicked problems requires the harnessing of creativity and knowledge by working to enable a shared understanding using collective power to shape our futures (Martin, 2009), a definition very similar to capacity building. Implications were that action learning coaching provided a useful framework for
organizations to expand the abilities of managers in how they connected creativity and
innovation for mutual collaboration.

Summary

In this chapter, the study’s precepts that include novice HRD professionals, incidental
learning and capacity building through action learning coaching have been linked to related
literature and empirical studies. The literature review shows not only that novices must pass
through the necessary stages of development on their way to proficiency and competence but
also that informal learning, tacit knowledge creation, and coaching may play a role in the
resultant knowledge transfer to practice and ultimately, capacity building. There is a paucity of
literature on the topic of novice HRD professionals, at least as it relates to individual learning
and development other than formal means. Further, the literature is mostly silent on the
integration of action learning and coaching to build future capacity within these novices. This
study endeavors to redress the issue by showing not only the value in the integrated methodology
but also its operationalization.
CHAPTER 3

METHODOLOGY

Researchers should take care to reflect accurately on their epistemological stance, the practices that informed their approach, and the design of their study (Reason & Bradbury, 2008, p. 236). The following sections detail the research approach, including a detailed description of the action learning action research process that then informs the study’s design, demographic information, data collection, and data analysis. Concluding the chapter is a discussion of the study’s limitations and delimitations as well as researcher subjectivity.

Research Approach

Action research is a systematic approach to investigation (Stringer, 2007) that enables participants to observe, understand, and ultimately change a situation, while also reflecting on their own actions (Dickens & Watkins, 1999). The outcomes of action research are both an action and a research outcome, unlike traditional research whose outcomes are knowledge only (Coghlan & Brannick, 2010). There are three types of action research. First person is undertaken as self-study, while second person action research is the development of group or peer practices, and third person is research on a community level (Reason & Bradbury, 2008). As second person research, ALAR provides opportunities for developing practice as research and research as practice (Lowstedt & Stjernberg, 2006). Separately, action learning and action research maintain rich research traditions, and while they share many of the same tenets, there are some fundamental differences as well (McGill & Beaty 1995; Raelin 1999; Sankaran et al. 2001). Both action learning and action research are based on a similar learning cycle, focus on learning in action, and emphasize collaborative relationships. Where they are different is in their
goals. Action learning is an educative process with its focus on learning, while action research is focused on research (Coghlan & Coughlan, 2007).

As both action research and action learning are related processes (Dick, 1997), there exists a variety of approaches to action research (Aniekwe, et. al., 2012). Action research is an approach to knowledge generation that is based on a collaborative problem-solving relationship between researcher and client and that aims at both solving a problem and generating new knowledge (Raelin & Coghlan, 2006). Action learning is a dynamic method that involves a small group of people using insightful questions in order to solve real problems, and gain greater insight into themselves and what they are learning (Marquardt, 2004).

Action learning and action research have been used together under the acronym ALAR for some time (Sankaran et al. 2001; Zuber-Skerritt, 2003; Coghlan & Coughlan, 2006). In ALAR, members share experiences with the intention of learning about themselves and from each other (Kuany, 2012) and has been utilized particularly when referring to research that involves improvement of individual practice (Zuber-Skerritt, 2009). Typical conceptualizations use action research as the lead approach (Kuany, 2012), or describe action learning as a subset of action research (Coghlan & Coughlan, 2006). Some scholars, however, use a seamless method of ALAR that links action learning and action research (Coghlan & Coughlan, 2006; Zuber-Skerritt, 2011). This approach is likened to participatory action research as a “social process of collaborative learning realized by groups of people who join together in changing the practices through which they interact in a shared social world” (Kemmis & McTaggart, 2005).

Enacting an action research plan typically begins with collaboration and problem definition with stakeholders, then goes on to include planning, gathering data, taking action, and fact finding about the results in order to plan and take further action (Coghlan & Jacobs, 2005).
In ALAR, the plan is similar, beginning with the same collaboration and problem solving stakeholder definitions. Iterative cycles of identifying the problem, making plans for innovative improvements, taking action, interpreting results, and making plans for the next make up the rest of the ALAR process (Zuber-Skerritt, 2009).

In the study, action learning was coupled with business coaching, which involves unlocking a person’s potential to maximize their own performance, and helps them to learn rather than teaching them (Whitmore, 2003). According to O’Neil and Marsick (2014), bringing coaching into an action learning process can aid self-development and problem identification and can utilize such tools as 360° feedback, personality inventories, and interviews. Seemingly, novices are ripe for this manner of improvement, as the benefits of coaching can assist those involved in learning how to deal with rapidly changing environments, build internal capacity to face new challenges and develop skills including the ability to think outside of the box, cross boundaries, integrate perspectives, and experiment with feedback (O’Neil & Marsick, 2014).

Case Study

This study produced a single, descriptive case study in order to “identify recurrent patterns in the form of themes or categories” (Merriam, 1998, p.12). As well, the combination of action learning and action research under the acronym ALAR was chosen as an ideal platform for engaging novices in improving processes, and applying practical means of learning (Chapman, 2002). Specificity of focus makes case study an “especially good design for practical problems—for questions, situations, or puzzling occurrences arising from everyday practice” (Merriam, 1998, p.29). Further, case study is a comprehensive research strategy that provides for an in depth investigation of issues with common time and place (Creswell, 2008). Case study was chosen as an overarching methodological strategy and as a way to “concentrate attention on
the way particular groups of people confront specific problems taking a holistic view of the situation” (Shaw, 1978, p. 2). To be sure, this research study of novice practitioners met the criterion described.

**Demographic Information**

Typically, qualitative studies are designed around a small sample of purposefully selected participants to gain “in-depth understanding rather than empirical generalizations” (Patton, 2002, p. 230). Comprising two action learning sets, the study included a purposeful sample of ten individuals who were new to their roles in the fields of workplace education, instructional design, and training and development. Demographic data were collected at the beginning of the study and confirmed after the conclusion of the last action learning set meeting. Below, Table 2 provides details on the participants. Shown are pseudonyms chosen by the participants to protect their identities.

<table>
<thead>
<tr>
<th>Table 2 Study Demographic Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pseudonym</strong></td>
</tr>
<tr>
<td>Blair</td>
</tr>
<tr>
<td>Harry</td>
</tr>
<tr>
<td>Lee</td>
</tr>
<tr>
<td>Sam</td>
</tr>
<tr>
<td>Wayne</td>
</tr>
<tr>
<td>Daria</td>
</tr>
<tr>
<td>Lisa</td>
</tr>
<tr>
<td>Marie</td>
</tr>
<tr>
<td>Rasheen</td>
</tr>
<tr>
<td>Travis</td>
</tr>
</tbody>
</table>
Participants in Cohort 1 learned of the study through membership or other participation in Association for Talent Development (ATD). Four of the participants in Cohort 1 responded to a recruitment announcement posted on the ATD website that sought novices to join a special interest group, and one participant was approached at an association conference. The participants of this first cohort were career changers, with three having recently made the change from careers in IT to those in training and instructional design. With the exception of one participant, a student who was also changing careers, the positions they held or aspired to hold at the time of the study were typically second iterations of their careers, or at least within similar job families in workplace education. Cohort 1 was comprised of one female and four males. Their ages ranged from 29 to 57 with a mean age of 46 years old. The mean number of years participants of Cohort 1 had been in the workforce was 19.2 years, with a range of 6 to 33 years. The mean number of months in their current position was 10.6 with a range of 2 to 22 months.

Participants of Cohort 2 learned of and joined the study in disparate ways. Two participants were referrals from individuals who knew of my study, and another participant responded to an online recruitment posting on a National ATD forum for new career entrants. After conversations at an ATD conference and a local monthly meeting, three more participants became part of the study. Cohort 2 contained two male and three female members. Their mean age was 27.8, ranging from 23 to 36 years. Their mean tenure in the workplace was 4 years, with a range from 4 months to 12 years. The mean number of months in their current roles was 5.5, with a range of 2 to 14 months. Cohort 2 could be considered early career entrants with 3 out of 5 participants in their first role ever.
Data Collection

The primary methods of data collection for this study were derived from an initial questionnaire, the verbatim transcription of action learning set meetings that took place synchronously and virtually via Adobe Connect and semi-structured interviews after the sets’ conclusion. In qualitative research, validity refers to whether the findings of a study are true and certain—“true” in the sense that research findings accurately reflect the situation, and “certain” in that research findings are supported by the evidence (Guion, Diehl, & McDonald, 2011). In this study, care was taken in developing methods of data collection that ensure findings would be presented appropriately. The data collection timeline for the study is illustrated in Appendix A.

Initial Questionnaire

The purpose of the initial questionnaire was two-fold. First, the questionnaire provided a way to qualify or exclude prospective set members. The beginning of the survey contained simple demographic questions and asked the length of time within their role, and current industry. Next, the questionnaire was to provide information on common problems experienced by novices in the industry, and to ascertain their level of confusion or anxiety they experienced, if any. This was accomplished through open-ended inquiries and was designed in hopes of providing an understanding of the typical coping mechanisms and issues they dealt with in their workplaces:

1. Think about a time in your work so far where something was unclear to you. What was it? What did you do to learn about it? Who or what helped you solve the problem?

2. Think about a time when you felt particularly underprepared for this position. What happened? What did you do to learn about it? Who or what helped you
solve the problem?

3. What is your most difficult or most complex challenge in your work right now? Is anyone helping you deal with it?

Initial questionnaires (see coding in Appendix B) were offered to participants at the same time as the study consent form that was required per IRB (see Appendix C for consent form). All 10 participants returned the consent forms, however one participant did not return the initial questionnaire.

**Action Learning Set Meetings**

Through the rigor and pace of regularly held action learning set meetings, the set allows each individual to develop the ability to reflect upon proposed plans of action and consequences, and encourages reinterpretation of the realities of that plan and its implementation as they unfold (Garratt, 1991). Data collected from Adobe Connect recordings of action learning set meetings produced rich narrative from the novices’ perspectives. Adobe® Connect™ is described as a web conferencing platform that powers web conferencing solutions and digital meetings that enable collaboration and communication (adobe.com, n.d.).

As the host of the meetings and holder of the Adobe Connect account, I set up meetings in advance of agreed-upon dates, and sent links to participants to enable their joining the sessions. Each invitation contained login information and a link to access the meeting. For Cohort 2, a conferencing number was set up to allow for dial in participation. Participants donned headsets and could view each other in real time via webcams. On the day of the meeting, participants logged into the Adobe Connect meeting room in order to begin the session. Since Adobe Connect provides the host the opportunity to share their screens with participants, prior to each meeting for both cohorts, I posted a PowerPoint on the screen to guide the agenda and to
facilitate questions and discussions. Because participants are autonomous persons, Herr and Anderson (2005) advocate that researchers offer consent to participants as a way to ensure they know what to expect in the research process, and thus can become empowered agents of their own change efforts. The act of recording the participants was made known and requested before each session. In so doing, transparent consent was made part of the research.

An initial welcoming meeting focused on tools that identified each set member’s personal problem, after which set members brought a significant work problem to the group for consideration. Figure 3 details the roles of the action learning participants, including the case holder, the set, and the coach.

![Figure 3 Roles of AL Set Members](image_url)

After presenting their case, the case holder culled understanding from group perspectives and questioning insight, ultimately coming to his or her own conclusions about the problem through reflection. During action learning coaching sets, participants shared professional experiences, discussed work-based problems, interrogated case holder assumptions, and reflected
on the resulting action. Set members used action learning to work through real problems experienced in their workplaces.

**Researcher Notes**

Researcher notes are the narrated records of a researcher’s analytical conversations with herself about the research, and as such, provide particular ways of knowing (Lempert, 2007). After each action learning set, I wrote my impressions of what happened during the set for the purpose of extracting salient themes. One such narrative follows, and shows my mindset:

I had a moment of panic in the middle of transcribing the second action learning session. I felt very strongly that I was doing it all wrong; it was easy to see all of the clear, blatant flaws as a facilitator. Not only did I continue to talk too much, monologuing for quite some time in explaining the action learning process, but I also forgot to keep the session on track and we veered off track slightly with one of the participants adding extraneously to the problem. In my panic, I started to fantasize about scrapping the action learning methodology in favor of cycling through different methods to “make sure” they learned in the process. As I finished the transcribing, I had an epiphany, realizing that I am learning, just as they, and all I have control over is making sure I stay out of the way, and get better and more aware of my blind spots with each session. As much as I would like to be, I am not in charge of informal learning. Learning is taking place; it is organic and free flowing. I have to keep this in mind.

A reciprocal research stance is taken in which the researcher and researched “recognize each other as fellow, moral human beings, and enforce on each other the adherence to a suitable set of moral norms” (Wax, 1982, cited in Herr & Anderson, 2005). This safeguard in research, although subject to the researcher’s thoughts and feelings as a result of the observed occurrences, assured my observations were ethically grounded.

**Interviews**

Interviews are vital sources of case study information (Merriam, 1998; Yin, 2002). Of critical interest in the study was a focus on the participant’s learnings and reflections after the set meetings. These tied to the study’s research questions and inquired as to the following:

- How does one become a proficient, competent practitioner?
What are the conditions for learning?

How do novices make tacit knowledge explicit?

How are novices building capacity through participation in action learning coaching?

Creswell (1998, 2003) suggests general guidelines concerning interview protocols and questions that include the heading, instructions to the interviewer, key questions, in addition to probes to follow the key questions. Included in Appendix B is the interview protocol for the study. Individual interviews were conducted after the conclusion of the second cohort. All interviews were administered via Adobe Connect and recorded, and each resulting video was converted into a vocal format and transcribed by a professional transcriptionist.

Data Analysis

As Merriam (2009) asserts, “the analysis of data involves identifying recurring patterns that characterize data” (p. 23). Analysis was primarily performed on the individual level, with an investigation into the participant’s impact on the organization and system level because of their participation in action learning coaching. Qualitative data analysis was executed on both the initial questionnaire and the semi-structured interview transcripts using a coding process. Following verification of accuracy of the data, the questionnaire and transcripts were read, looking for recurring themes and concepts that linked to the study’s research questions. The data were entered into HyperResearch for thematic analysis and for the development of a codebook.

For the initial questionnaire, I searched for themes that answered research question 1: How do novice HRD practitioners construct the challenges they face in their new roles? I looked specifically at answering how one becomes a proficient, competent practitioner. As for the interviews, themes were sought in answering the second and third research questions. The
second question asks: how do these novices make meaning of their participation in action learning coaching? With this question, I noted themes associated with finding the proper conditions for learning, and looked for ways the participants made their tacit knowledge explicit. As well, research question 3 was answered in this manner. The question was: what systemic changes will they make in their professional practice as a result of participation in action learning coaching? Similar to the practice mentioned above, I looked for subthemes as my codes. I searched the meeting transcripts to see any themes where participants might have discussed how their capacity was built through participation in action learning coaching. Appendix E shows the coding schemes for the levels of analysis described.

**Trustworthiness**

Several methods were employed with the intent of increasing trustworthiness to provide for a transparent and auditable trail of research methods, including triangulation (Denzin, 1970), member checking (Guba & Lincoln (1989), and researcher memos (Yin, 2010). Data triangulation or the gathering of data through multiple sampling strategies (Denzin, 1970) took place through the collection of data from two cohorts. Methodological triangulation, which refers to the use of more than one method for gathering data (Denzin, 1970) was used in interviews and set meetings. Member checking occurred throughout the data analysis process, when transcribed and coded data from action learning set meetings were provided to set members for their input and approval.

**Limitations and Delimitations**

Every study has a set of limitations. As detailed next, the limitations contained in the study represent “potential weaknesses or problems with the study identified by the researcher” (Creswell, 2005, p. 198). Explicitly stating the research limitations is vital in order to allow
other researchers “judge to what extent the findings can or cannot be generalized to other people and situations” (Creswell, 2005, p. 198). Consequently, the limitations are as follows. First, as there was a small sample size of ten participants, the conclusions that can be drawn from the study are narrow. Next, Cohort 1 met monthly, and their infrequent meetings and poor attendance limited the cohesiveness and trust building necessary for deep learning to occur. Each time a participant missed a set meeting, the group had to refocus and relearn the methodology. Intermittent meetings and difficulty in scheduling also limited data collected from meetings, and learning over time. Finally, as a novice action learning coach, I was limited in my ability to lead a group and understand the nuances of action learning. Certainly, I progressed as coach during the study, but I learned the methodology alongside the participants, and perhaps limited the outcomes due to my coaching naiveté.

Delimitations refer to “what the researcher is not going to do” (Leedy & Ormrod, 2005). Contained herein are the study’s delimitations. First, participation in the study was delimited to only novice practitioners in the field of workplace education, and to those who had practiced within the field for less than three years. Beyond extracting demographic data, no verification was performed on their level of knowledge in the workplace. Next, the focus of the research was based on work-related problems as described by the participants. Problems, work related issues or any actions taken were believed on face value. Finally, stated learning outcomes and application to practice were all self-reported and delimited by the participants’ representations.

Subjectivity

Kingry-Westergaard & Kelly (1986) asserts that a researcher’s methods are influenced by her interests, values, and assumptions. After paying attention to the potential impact of my own personal biases, prejudices, expectations, and worldview on the phenomenon under study
(Marshall & Rossman, 1999), I sought to inquire as to how other novices in human resource development could be helped through a different method of assimilation to their professional selves. In this section, I begin by sharing my personal journey as a means of explaining the lens through which I have come to view this study, and end by acknowledging that I continue to be a work in progress.

I have always said that the idea for conducting this study began with my experience as a new HRD practitioner. In actuality, the seeds of this study were sown the moment I was laid off from a long career in mall management. I decided to reinvent myself through education, and I began work on a Master’s in Workforce Development Education, and continued on to a doctorate after discovering my thirst for knowledge had not been quenched. Alongside that journey, I became a career changer into the HRD profession though work as an Instructional Designer. Within this new role, I experienced ambiguity, complexity, and confusion. I felt the angst of wanting to be seen as an expert while feeling very much the amateur, and was quite irritated when I did not know a subject well enough to teach it competently and confidently. Not knowing how to solve a problem or understand a solution was upsetting, and my lack of experience placed me in situations in which I was reticent to navigate.

As I struggled in the shadows of my confusion, I actively sought out others in similar situations, and tried to position myself for professional experiences in hopes they would ease my fears of not knowing enough in my new role. Certainly, all novices undergo some sort of confusion and resultant learning, and ‘learn their way through’ situations that are new, confounding, or challenging. I realize that novices must go through these disorienting dilemmas (Mezirow, 1978) in order to come out on the other side of competency. My confusion might have solely been my own, and undertaking a study based on such feelings could constitute bias.
It is fortunate that my graduate studies supplied me with the tools I needed to try on a critical lens, and develop reflective practice and an epistemological point of view in order to be cognizant of this and other ways of being.

As a novice practitioner and member of the local Association of Talent Development (ATD) chapter, I believed myself to be an insider. An insider is a researcher who has “lived familiarity as a member of the group, activity, or culture under study” (Griffith, 1998, p. 361). Indeed, membership and affinity did afford me a direct path to the sponsor, providing direct access and opportunities I might not have otherwise had. However, this insider status presented challenges as well. My familiarity with ATD was as a volunteer within the association, as well as a novice taking part in industry professional development opportunities. However, in short order after establishing the first action learning set, I found that my closeness dissipated and I was perceived by the set members and ATD leadership as an outsider. Surely, had my study been designed along more traditional action research lines (if those even exist) by using an AR team and interventions instead of using an action learning action research (ALAR) approach, proximity may have provided a closer relationship and perhaps insider status. My outsider status afforded me the space to conduct the sets almost as a consultant to both the members and the sponsor without having to engage in the inevitable politics surrounding a volunteer-based association. Yet, I had to take on a leadership role and make choices and assumptions rather than have a group to provide counterbalance and support.

Knowing that I have come a long way from the outset of the study in demeanor, maturity and knowledge, I continue to need support as a bourgeoning scholar-practitioner. I aspire to become the kind of coach and researcher that John Dewey describes:
Someone who is unremittingly serious and dour and carries the burden of the world on his or her shoulders energizes no one. Humor and playfulness have an important role in social change processes. This is because AR projects attempt to suspend business as usual and try to produce unlikely but positive outcomes (Greenwood & Levin, 1998, p.107).

There is much to learn.

Summary

This chapter outlined the methodological techniques used to organize, gather, and analyze qualitative data for the study. Included in the chapter was a detailed description of the action learning and business coaching processes that were complimentary to the single case action learning action research design approach utilized in this study. This approach seemed ideal because it enabled a detailed account of the action learning coaching intervention’s impact on novice human resource development professionals. Limitations, delimitations as well as researcher subjectivity concluded the chapter.
CHAPTER 4

CASE STUDY

Except for my advisor Dr. Watkins, who was guest coach, Harry was the only participant in the Adobe Connect room at 7:08 PM. Somehow, I hoped I had forgotten to turn on their webcams and the other four participants were ready to start tonight’s virtual action learning set meeting. All members had confirmed the day prior, so their absence was at once puzzling, troubling, and embarrassing. Harry suggested for the future that I associate a dial in number, surmising at the very least, the number would provide a wider array of options for participation. It was a good suggestion, but it was a solution I had tried and abandoned after the number was not used in any of the previous meeting nights. Since Harry had already blocked out the time and we three constituted a group, the action learning set commenced. Fortunately, the meeting produced significant personal insight for Harry, and provided me with the structure to conduct subsequent meetings. However, as it turned out the dial in contingency would not have mattered: all of the other members of Cohort 1 had competing commitments that night.

Several months later, conversations overlap as a different group of action learners enters the virtual meeting space promptly at 7:00 PM. From the screen, I can tell Travis and Rasheen join on the phone while Daria and Lisa use webcams. The participants all acknowledge each other—verbally for those on the phone, while virtual attendants smile and wave to each other, and utilize the chat window for quick messages. Intent on making the meetings fit into his frequent travel, Rasheen dialed in from a different locale each week. This time, he told the group he was two and a half hours from home and planned to drive while connected to the call. After
another minute of chatter, the chime signals Marie’s arrival. Another weekly action learning coaching session for Cohort 2 had begun.

Why did one group regress while the other persisted? The answer to this question is offered in this chapter through the detailing of the learning journey of two cohorts of novice human resource development practitioners with me as their similarly inexperienced coach. The purpose of this action research case study was the exploration of action learning coaching as a means of personal and professional development for novice human resource development (HRD) practitioners. Three key questions guided the study: (1) How do novices construct the challenges they face in their new roles? (2) How do these novices make meaning of their participation in action learning coaching? (3) What systemic changes will they make in their professional practice as a result of participation in action learning coaching?

Case Framing

Since action research tells a good story, provides rigorous reflection on that story, and generalizes usable knowledge after reflecting on the story (Coghlan & Brannick, 2010), I take care to present all three. Highlighted here is our collective experience in ‘doing’ action learning as novices that manifested as a sometimes floundering, yet emergent process. The chapter acknowledges the ‘messy human systems’ that arose in the study, taking the forms of unstable member participation and stifled group formation, alongside individual capacity building and systemic application of changes in the participants’ workplaces. Case study captured the rich meaning behind the story of research and allowed for in depth analysis and deep reflection.

Adding to this richness was the opportunity to operationalize Zuber-Skerritt’s (2009) integrative approach to action learning action research. Cycles consisted of identifying the problem, making plans for innovative improvements, taking action, interpreting results, and
making plans for the next actions, and inform the chapter’s organization. Within each cycle are insights influenced by group formation theories from Mink, Mink and Owen (1992), and group cohesion from Wilfred Bion (1961). O’Neil and Marsick’s (2014) coaching interventions are added in later cycles to provide depth and glean insight from the research.

The next section provides brief background information on action learning and coaching, within which O’Neil and Marsick’s (2014) action learning coaching interventions are described. A brief explanation of group processes round out the section, and include models from Mink, Mink & Owen (1992) and Bion (1965).

**Action Learning and Coaching**

In a typical action learning scenario, as Figure 4 depicts, a learning coach, through questioning helps a small group focus on work-based problems and reflect on the actions they could take to effect learning and performance outcomes (Cho, 2013). A case holder presents a problem for the group that is of sufficient difficulty, or is worrisome to the individual in their work. The set works together to ask the case holder challenging questions, uncover hidden assumptions, and reveal pathways to insight and greater understanding. The action learning coach guides the process and encourages reflection and action, and may pause the prescribed process in order to reframe or accentuate an area of learning.

In business coaching, employees are similar to athletes whose coaches guide them to transcend their performance and deal with any difficult situation (Meston & Sturtzer, 2002). Coaches use a variety of skill sets in working with action learners in order to help them learn from their work (O’Neil, 1997). O’Neill and Marsick’s (2007; 2014) work shown in Table 3 is used to show the interventions coaches use to create situations for learning, and will be used in later sections to show the coaching interactions used in this study.
Revans (1988), who conceptualized action learning largely as a group process, believed that a group’s “ultimate power lies not in the brilliance of its individual members, but in the cross-fertilization of its collective abilities” (p. 8). Thus, group level processes are important to consider when conducting action learning.

### Table 3 O’Neill and Marsick’s Action Learning Coaching Interventions

<table>
<thead>
<tr>
<th>Situations</th>
<th>Action learning interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating an environment for learning</td>
<td>Emphasize confidentiality</td>
</tr>
<tr>
<td>Specific interventions for learning</td>
<td>Create a supportive environment</td>
</tr>
<tr>
<td></td>
<td>Use questioning</td>
</tr>
<tr>
<td></td>
<td>Use reflection</td>
</tr>
<tr>
<td></td>
<td>Use critical reflection</td>
</tr>
<tr>
<td></td>
<td>Use Just-in-time-learning</td>
</tr>
<tr>
<td></td>
<td>Make work visible</td>
</tr>
<tr>
<td></td>
<td>Create ways to help think differently</td>
</tr>
<tr>
<td></td>
<td>Challenge the team</td>
</tr>
<tr>
<td>Transfer skills needed for learning</td>
<td>Help participants to give and receive help and feedback to each other</td>
</tr>
<tr>
<td></td>
<td>Help to learn how to transfer learning</td>
</tr>
<tr>
<td></td>
<td>Say nothing and be invisible</td>
</tr>
</tbody>
</table>
**Group Level Processes**

A group is best understood as a complex system made up of individuals who are themselves complex systems, each guided by goals and perceptions that change over time (Hackman, & Katz, 2010). Mink, Mink & Owen (1992) suggest there are three phases that all groups go through in the development process: Getting Started, Working Together, and Producing/Unity. Within each of these phases are norms that the leader of the group must satisfy in order to obtain the desired outcomes of that phase: Developing Trust, Individual Differences, Giving Feedback, Solving Problems, and Letting Go (Mink et al., 1992). Outcomes such as trust, cohesion, competence, growth, and unity are essential to allowing the group to move forward to the next phase, and can be elicited using various techniques (Mink et al, 1992).

Bion believed that for a group to exist, the members must share a function, goal, or task (Rioch, 1976). All groups, according to Bion fluctuate between rational and irrational states. When in the rational state, the group is ruled by what Bion called the “work group,” is generally successful, and remains focused on the group’s tasks. When the group state is irrational, the group is led by basic assumptions, which operate outside of awareness, but significantly shape the group’s behavior and are made up of fight/flight, dependency and pairing (Bion, 1952, 1961). In dependency, the group tries to hold on to feelings of security and project their insecurities on the group leader. In the basic assumption of fight-flight, the group seeks to preserve itself and avoid anxiety by either running away or fighting. In fight, the group may be aggressive and hostile, and in flight, the group may waste time or not show up at all. Finally, pairing happens when two people splinter from the group and in attempt to lead the group through their continued interaction.
In telling the story of research, the processes by which the groups formed and coalesced are as important as the methods of enacting action learning action research (ALAR). Table 4 illustrates the steps as they relate to each cycle of the ALAR case study, and provide structure for the remainder of the chapter.

**Cycle 1: Identifying the Problem**

In order to begin action research, the process of entering into a system and securing a client is essential. In May 2013, I attended an Association for Talent Development (ATD) Chapter meeting. ATD, the acronym for Association for Talent Development, provides professional development space for workplace education practitioners. After the meeting, I followed up with the local ATD president, Elizabeth Summer¹. I asked her if we could meet to discuss my proposed AR study, and we set a date for the next week.

**System Entry**

Ms. Summer and I connected over coffee, and I explained the reason for my request. In traditional research, the researcher “makes every effort to remain objectively remote from the system being studied” (Bawden, 1991 p.37). However, action research “brings together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities” (Reason & Bradbury, 2001, p. 1). A new instructional designer after having repackaged my business career, I was feeling confused and overwhelmed about my lack of knowledge. Presuming that others who were new to their professions felt similar angst, I desired to work with novices in the industry. My emerging logic was that newly inducted professionals suffered greatly from the ambiguity that surrounded their

¹ Name is a pseudonym
decisions of how to perform critical HRD tasks, and participation in a group of their peers would nurture them in the journey toward expertise.

Table 4 ALAR Stages and Cycles

<table>
<thead>
<tr>
<th>Stages of ALAR</th>
<th>Cycle 1</th>
<th>Cycle 2</th>
<th>Stages of ALAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifying the problem</td>
<td>Problem framing discussion with ATD</td>
<td>Attendance at ATD learning event and</td>
<td>Identifying the problem</td>
</tr>
<tr>
<td></td>
<td>President and Client Entry</td>
<td>discussion with HROD student group</td>
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<td></td>
<td>ATD Workshop</td>
<td>Jul-13</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Making plans for</td>
<td>IRB Approval</td>
<td>Review of Cohort 2 results from initial</td>
<td>Making plans for</td>
</tr>
<tr>
<td>innovative improvements</td>
<td></td>
<td>questionnaire, in which they described</td>
<td>innovative</td>
</tr>
<tr>
<td></td>
<td></td>
<td>novice problems</td>
<td>improvements</td>
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<td></td>
<td>Begin recruiting for Cohort 1</td>
<td>Feedback from Cohort 1 member on set</td>
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<td>design and expectations</td>
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<td>Review of Cohort 1 results from initial</td>
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<td>questionnaire, in which they described</td>
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<td>novice problems</td>
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<td>Taking action</td>
<td>Cohort 1 Action</td>
<td>Cohort 2 Action</td>
<td>Taking action</td>
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<td></td>
<td>Learning Set Begins</td>
<td>Learning Set Begins</td>
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<td>Cohort 1 having initial problems with</td>
<td>Member check of themes and codes</td>
<td>Interpreting</td>
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<td>technology. IRB resubmission to add</td>
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<tr>
<td>Interpreting results</td>
<td>Cohort 1 begins to experience difficulty</td>
<td>Cohort 1 &amp; 2 Interviews</td>
<td>Sep-14</td>
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<td></td>
<td>in scheduling &amp; inconsistent attendance</td>
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<tr>
<td>Making plans for the next</td>
<td>Consultation with set members on</td>
<td>Cohort 2 Conclusion</td>
<td>Making plans for</td>
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<td>actions</td>
<td>schedule</td>
<td>Aug-14</td>
<td>the next actions</td>
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<td></td>
<td>Begin recruiting for Cohort 2</td>
<td>Stakeholder presentation &amp; recommendations</td>
<td>Mar-15</td>
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<td>Feb-14</td>
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<td>Cohort 1 Concludes</td>
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</tbody>
</table>

Ms. Summer acknowledged that since the local ATD chapter regularly manages special interest groups (SIG) on such topics as Organization Development, E-learning and one leading to ATD’s industry designation, Certified Performance and Learning Professional (CPLP), starting a
SIG for novices would be beneficial for the chapter. She indicated that she knew of quite a few new members who were just starting out in the profession or who were career-changers new to the field. The president agreed to be the sponsor of the study, and allowed me access to the website for announcements and access to the membership for starting a SIG group. Not only did she pledge her support for any resources I would need, but also she was excited for me to span the boundary between theory and practice. In fact, already viewing this as a need within the chapter, she informed me of an upcoming special session for those new to training that was entitled, “Training and Development Uncovered.” Ms. Summer explained the intent of the Saturday session was for those who were relatively new to the profession and thought it would be a good opportunity for me to access study participants.

**Problem Framing**

ATD is a professional association whose membership performs human resource development (HRD) duties and hold diverse titles such as instructional designer, corporate trainer, business coach, and organization development consultant. My role in coming to the Saturday event was as much as a qualitative researcher as a participant, since it was not too long prior that I made a career switch into the field. After the arrival of the twenty-two attendees who were all novices, participants revealed in an icebreaker their lack of clarity in their new roles, and expressed hope that the presenters would fill in the blanks. One by one, the attendees spoke of being new to their jobs through career change, recently assumed work duties, or as new graduates, and shared that they were overwhelmed with their assignments. A frequent worry was in taking on these new duties when still only growing into confident experts.

The session was organized according to ATD’s freshly revised Competency Model (see Fig. 5) that identified the knowledge, skills, and behaviors practitioners needed for successful
performance in the field (Arneson, Rothwell, & Naughton, 2013). Categories included change management, coaching, evaluating learning impact, instructional design, training delivery, knowledge management, learning technologies, managing learning programs, performance improvement, and integrated talent management (Arneson, Rothwell, & Naughton, 2013). This information was peppered with adult education history, learning theory, learning styles, and assessment topics. It was a significant amount of information to absorb. In very short order, these very same individuals would be tasked—if they were not already—to produce and deliver learning experiences in the workplace.

![Figure 5 ATD Competency Model](image)

**Figure 5 ATD Competency Model**

**Cycle 1: Making Plans For Innovative Improvements**

Scholars argue that formal training does not produce sufficient practical learning nor actionable knowledge because it does not incorporate live or real-world experience into the learning process, nor can it induce sufficient reflection on that form of experience (Coghlan &
Coughlan, 2007). In fact, Garratt (1991) states that adults learn best from live projects, from the support and constructive criticism of colleagues, from rigorous self-reflection leading to serious reinterpretation of their previous experiences, and from a willingness to test their hypotheses in action (p. 24-25). Did the workshop in any way provide participants with the capacity to generate new knowledge through continuous learning and change? Did they now have the ability to embed this knowledge in systems and practices, and transform this knowledge into new products and services, which are skills HRD scholars identify as high expertise (Marsick and Watkins, 1999, p. 80)?

After reading an article on Reg Revans, the man credited with the creation of action learning, I was struck by a quote in which he said, “the clever man will tell you what he knows; he may even try to explain it to you. The wise man encourages you to discover it for yourself even though he knows it inside out” (McNiff, 1988, p. 52). As I reflected on the difference between cleverness and wisdom, a small but important distinction came to mind. In the workshop and in the workplace in general, HRD professionals were being trained to be clever, instead of being groomed to be wise. Certainly, a clever person is sharp, skillful, witty, and inventive. However, as a person becomes wiser, they understand that in order to most effectively change a group, company, environment or the world, the individual must first change from within (Garrison, 2012). These reflections became the impetus for research and I began to make plans to undertake a study that would examine how novice professionals could gain competency and build capacity.

**Participant Recruitment**

Upon receiving IRB approval, the recruitment of study participants was the next goal to begin the study. Participants in Cohort 1—Harry, Wayne, Lee, Blair and Sam, were members of
otherwise participated in local activities of the Association for Talent Development (ATD). Harry, Wayne, Lee, and Blair were recent career changers into the field of HRD, with two of them having recently made the change from careers in IT to those in training and instructional design. The three responded to a recruitment announcement posted on the ATD website that sought novices to join a special interest group.

Sam, the last participant to join Cohort 1, was at an ATD conference and expressed interest in joining. He was a student who was also changing careers to instructional design. For the majority of members in Cohort 1, the positions they currently held or ones they aspired to hold at the time of the study were typically second iterations of their careers, or were at least within similar job families in HRD.

**Initial Data Collection**

Gathering initial data was the next goal in formulating the study. A demographic questionnaire was offered to the participants with the purpose of assessing the expressed problems novices had in their roles. The demographic questionnaire asked open-ended questions concerning any challenges they faced as novices and how they went about solving problems at work. Specifically, the questions were designed to provide an understanding of the level of novice stage they occupied, as well as determine their typical coping mechanisms.

Data collected from the demographic questionnaire indicated that the respondents sought resources, including documents, people, and training to assist them. In answering the question about their most difficult or most complex challenge at work, one responder answered, “I am overwhelmed by everything I have to do”. Another answered the question by remarking that their bosses were supportive, but they were “alone in figuring this out.” At this point, I continued
to read literature on novice learners. I thought about the problems I faced, and the manner of support that would have helped me when first started in the HRD field.

**Cycle 1: Taking Action**

Before the initial data were analyzed, the study was designed around building a Community of Practice. Communities of Practice (CoP) are groups of people who share a concern or a passion for something they do, and learn how to do it better as they interact regularly (Wenger, 1998). Etienne Wenger is the progenitor of the CoP concept, and he proposed that social participation held promise for a supportive, communicative environment that was conducive to learning and knowledge sharing. The idea was that the novice could accelerate their learning by nature of their engagement in CoP activities (Lave & Wenger, 1991) though sharing a concern, a set of problems, or a passion about a topic as they deepen their knowledge by interacting on an ongoing basis (Vestal & Campos, 2006). It was after the data analysis and a presentation to my doctoral committee that action learning, rather than a CoP, would offer a better learning experience for the novices. Action learning, it was presumed, provided an experience-based approach to learning in which individuals might learn more effectively with, and from other individuals while dealing with the real world complexity of organizational life (Yeadon-Lee & Worsdale, 2012).

Shifting in this manner was not problematic in and of itself. The challenge became my naiveté in using action learning, as I had only participated in one session and had never before assumed the role of action learning coach. The night before the first action learning set meeting in November 2013, I became rather panicked and attempted to educate myself by watching YouTube videos. Furthermore, even though the study changed from that of a CoP to action learning, much of the collateral stayed the same. From the recruitment posting to the participant
consent forms, the tone remained as one of forming a peer group to work on best practices in training and development. Under these realities, Cohort 1 began in November 2013.

November Meeting

If there were one phrase to describe the first meeting, it would be ‘technology failures’. Harry was the only person in the group of four who used headphones, and as a result, the audio was of poor quality and screeched constantly. However, none of us knew enough about Adobe Connect at the time to correct the problem. Harry and Lee explained the reason for coming to the group:

What I'm hoping to accomplish is just some new tricks of the trade, some new ideas and, you know, just thoughts that can go into what I do on a daily basis and try to make my job easier for myself (Harry)

As a brand new person to this, I want to learn everything I can. I’m like a sponge. My background is in web design, by the way. So this is all new to me. I’m here to learn (Lee)

The group’s beginning session could be likened to a webinar. Because of the technology issues, it became necessary to mute the speakers, leaving me as the only one talking. Many of the participants were already expressing that they expected to exchange knowledge and engage in dialogue about the industry. Both the action research and action learning methodologies were discussed, but it seemed that the set members in attendance were only comfortable exploring best practices and tips for training effectiveness. Nevertheless, we left the meeting with firm commitments to meet the next month in December.
December Meeting

Harry had a conflict at the time of the December meeting, which left Lee as the sole set member from the November meeting. Wayne, a new member who had recently been given a new training role at work, stated that his purpose for joining the group was to become more polished in presenting learning and measuring learning effectiveness. He said, “I’m in a position right now that I don’t even know what I don’t know.”

Because Wayne was a new member, the action learning methodology and purpose for the study was reiterated. I explained how typical action learning sets operated. Our first attempt with the process began by asking if anyone had a work problem. Lee volunteered to present his case about the difficulty he had in changing careers from a web design instructor to instructional design. Table 5 outlines Lee’s case. Lee was in search of clients and practice to build his portfolio. Both participants seemed willing to try the action learning method. Lee was the problem holder, and he spoke of his issues finding a job in the instructional design industry. After the set, Lee reflected:

It’s similar to what I’ve already done, at least a plan of action to say this needs to happen before this needs to happen before it all becomes real. And what I really like is having the people who do this for a living to ask me the questions to see what they think and their insight, because right now I’m relying on message boards and different things to ask. I really don’t know anyone in the industry, except you guys.
Wayne had a similar reaction to using action learning: “I think it’s a good way to force yourself to think through the hard questions and to hear answers from angles you have not thought at all—so, very good.” My researcher notes after the December meeting tell the story of my discomfort and concern over the action learning process:

One of the key components of action learning is making sure the problem is fully understood before moving toward defining solutions. I did not do this. Soon after Lee described the problem, we broke out of the questioning/statement format and began giving opinions. That broke the action learning format. I hope it does not prove detrimental.

After sending out a meeting invitation through Doodle to gauge the best day to meet in January, the date had to be changed twice because of conflicts. Once set, another email reminder was sent out.

**Cycle 1: Interpreting Results**

Even early on, signs pointed to issues brewing in the group’s formation and cohesion. Table 6 shows the corresponding Mink, Mink and Owen (1992) norm and Bion’s Basic Assumption.

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lee</td>
<td>1. How do I find clients to build my instructional design portfolio?</td>
<td>1. As a career transitioner, is Lee looking for work in the right places? 2. Is he forcing the issue of being an instructional designer?</td>
<td>1. Lee assumes instructional design is an easy career to break into. 2. Lee assumes he has the skills and desire to make the transition.</td>
<td>1. Go to non-profits to find jobs. 2. Learn the software necessary to produce a course. 3. Use your network to find jobs.</td>
</tr>
</tbody>
</table>
Table 6 December Group Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Fight/Flight</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td>Flight was beginning to be seen in avoidance of group and missed meetings.</td>
</tr>
<tr>
<td>Trust was not evident at this stage, as the group just started and new members were being added.</td>
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</table>

At this point, the cohort should have begun the process of Getting Started in Mink, Mink & Owen’s (1992) development process. Within this phase, the norm of Developing Trust is essential for members to feel a sense of connectedness and involvement to the group. For trust to develop, a reciprocal relationship is formed, as members must trust the group and the group must trust its members, for it is only through trusting that trust is built (Hackman & Katz, 2010, p. 641). On the contrary, group’s sense of connectedness was scarcely evident. With just two sessions, a different set of members attended each meeting making cohesion difficult. As a group, Cohort 1 did not display the expected signs of trust, cohesion, competence, growth, or unity that would allow the group to move forward to the next phase (Mink et al, 1992).

The scheduling issues that beset the group bring to mind Wilfred Bion’s work. Participants in the group seemed to try to avoid anxiety and difficult feelings by using Bion’s basic assumptions of fight/flight. In this basic assumption, the group may form such negative feelings that they may leave the group, or alternately stay but make their interactions contentious. This type of group behavior manifests in unconscious ways, members often act contrary to their stated goals (Bion, 1961). Cohort 1, it seemed, acted in a manner that was in contrast to what they said they would do, as in showing up for meetings.

January Meeting

For this session, three attended, and one new member was added. Blair was new to instructional design, but had been a trainer for many years. She had an entire team at her
disposal, but when the training grant ended, she admitted that it was difficult to become a novice again. Wayne and Harry engaged in a lengthy conversation about their issues with being a novice at work. While it was a good conversation, I was anxious to move on to the presentation of an action learning case to the group.

Before the session, I had a discussion with my advisor, Dr. Watkins about the groups’ apparent difficulty in maintaining independent dialogue. The group needed to transition from a conversation about action learning, to actually ‘doing’ action learning. Dr. Watkins suggested that she come into a session to model the process. I offered this to the group as an agenda item and the group agreed to the addition of Dr. Watkins. The group had still not formed well, and was now hampered by the basic assumption of pairing. Both Wayne and Harry broke from the group process and did not want to discuss anything other than best practices.

Table 7 January Group Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Pairing</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td>Wayne and Harry continued to discuss problems they had as trainers.</td>
</tr>
<tr>
<td>Trust was not evident at this stage, as there was no sense of connectedness within the group. New members were still being added.</td>
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**February Meeting**

I was optimistic about the February meeting. Dr. Watkins was ready to be the guest facilitator and I was to be the case holder. For my part, I was happy to see the process modeled in person, and had my case written out. The problem I wanted to present dealt with my inability to start a structured on the job-training program at work. However, the group did not show up as planned, and Harry was the sole participant. When it was clear that no one else would attend this month’s session, Dr. Watkins suggested that we proceed as a trio, and with that, we began the set meeting.
My case was about my own workplace, where I felt resistance in attempting to start a structured on-the-job program. Since I worked in a company that had been in business for many years, there was difficulty in changing the system. Table 8 shows the progression of the meeting from the problem I initially brought to the group to the restatement of the problem as a result of questioning, to assumption holding and finally to the actions I pledged to take.

I was fortunate to be able to watch Dr. Watkins’ facilitation and addition of a strict format that was lacking previously. This formula was repeated in all subsequent action learning sets.

Table 8 Angie's Case

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angie</td>
<td>How do I develop a structured on-the-job-training program?</td>
<td>1. How can Angie push past her fears about her ability to influence key stakeholders, and work with her boss and others on a training and development plan for the company? 2. How can Angie become a change agent and get out of her own way?</td>
<td>1. Angie is trying to fix a problem for which there is no solution. 2. Angie assumes the company really wants change. 3. Angie assumes if she is being blocked, there is something wrong with her methods.</td>
<td>1. Talk to a co-worker and bounce some ideas off of him. 2. Get in on scheduled meetings so she can speak for herself and not have to filter ideas for the department through her boss.</td>
</tr>
</tbody>
</table>

I later reflected on the duality of roles:

Frankly, I feel quite unsure of myself as a leader of an Action Learning set, but having Dr. Watkins in this session took away a good bit of the angst I feel in leading the group on my own. It was very interesting to feel like several people in one body—participant, leaders, student all rolled into one—and maintain the ability to be conscious of and move fluidly between all of them (Angie)

As is normally the case in action learning, the case holder is not the only one with reflections after the process unfolds. Dr. Watkins asked Harry if he had any reflections on the process:
Harry: It forces you to identify the core of what your issues are because you’re being asked those probing questions to try to determine where do I stand. How did I get here? How do I get out of this?

Dr. Watkins: That’s it exactly.

Harry: Well it’s a pretty interesting process. I certainly learned some stuff today. . . . Anybody could sit and read something or write something but when you have a group of people waiting for your answer like a job interview. And it’s a good thing in this line of work because you have to think on your feet. So its good practice, almost like practice being in a training environment

Dr. Watkins: And not only is that but it is also your problem Angie, so it’s to your advantage if we make any headway at all, and you’re stuck. You are feeling stuck on it. So if we can help you even a little bit to see what the next step might be, you’re better off. I hope.

Harry was positive about the experience, but also gave away misgivings about the process. He was unsure if he would want to be in my seat because “you’re put on the spot the whole time.” Presumably, there were issues with his connection to the action learning process.

Later, Blair, Lee, and Wayne were apologetic about not making the meeting. Blair was in a traffic jam and Lee and Wayne were working.

Table 9 February Group Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Fight/Flight</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td>The Basic Assumption of flight, used to avoid the meeting was present again</td>
</tr>
<tr>
<td>There was little commitment to attend the groups meetings</td>
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</tr>
</tbody>
</table>

Participation was becoming increasingly problematic, and a lack of commitment and group cohesion was showing in the cohort. The group had still yet to form in Mink’s first norm of developing trust, as members showed lack of obligation to the others. Bion’s basic assumption of flight showed again, as members did not just show up late, but not at all.
March Meeting

For March’s meeting, another Doodle poll went out, but this time the scheduling became even more labored. We finally settled on a date and most confirmed, except for Wayne who was traveling out of town. Blair, Harry and a new member, Sam attended. With a background in IT and graphic design, Sam was currently enrolled in a master’s program in Instructional Design. He hoped to get into Training and Development after his schooling was complete.

Table 10 Harry's Case

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harry</td>
<td>How do I develop a training program from scratch?</td>
<td>1. How can Harry put aside his fear of failure to best prioritize his time and assignment of training tasks?</td>
<td>1. That training has to be &quot;the basics&quot; or &quot;everything and the kitchen sink.&quot;</td>
<td>1. Hold regular meetings between priority setters to come to an agreement on new or existing priorities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. How does he make the “game slow down” for him?</td>
<td>2. Harry assumes there is one final solution to his problem</td>
<td>2. Set realistic expectations of yourself and others</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3. Harry assumes reprioritizing is a failure</td>
<td></td>
</tr>
</tbody>
</table>

Harry had been previously asked to present his case about starting a training program. Table 10 shows his original problem, assumptions and resulting action items. A PowerPoint slide was shown in the Adobe Connect window that served to reinforce the process of action learning with examples of proper questions as a guide (see Appendix F). The group began to ask questions that led Harry through his problem. In action learning, it is important not to give advice to the case holder, as the goal is for them to come to their own understanding. In this session, withholding advice was difficult for some, but the set members learned the process quickly. Harry offered his feelings about the group:
I learned some things about myself, really, just by putting them out there and getting the advice of strangers, really—input, not advice—of strangers as to some of the ways that I can go about resolving the challenges I face every day.

With the words “advice of strangers”, Harry effectively commented on the ineffective cohesion within the group and on the continued difficulty with forming and belonging. Clearly, Mink, Mink & Owen’s (1992) Producing Unity had not occurred at this point, and Harry noted as much in his reflection. Despite this, and owing to the positive response to the March meeting, I did not expect the April meeting to be any different. Due to many scheduling conflicts, however, when the appointed day came around, no one showed up for the meeting.

Table 11 March Group Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Fight/Flight</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td></td>
</tr>
<tr>
<td>Trust was still not evident. Harry’s mention of “strangers” evidenced his distance from the group. They were still strangers to him. Also, a new member was added.</td>
<td>Flight is again seen in the avoidance of group and missed meetings.</td>
</tr>
</tbody>
</table>

Consultation with Group Member

Sam, becoming frustrated with the cancellations and lack of meetings, sent me his thoughts on the project in an email:

I know everyone has an opinion, so take mine for what it's worth...I think it might be best on the next meeting to pick a time and date and stick with it, and move it to every two weeks instead of once a month. I think there's a big psychological component here. One month between meetings isn't frequent enough to build group cohesion, especially if "one month" actually turns into six weeks due to moving the date several times. This results in lowered commitment. People stick with volunteer commitments for "secondary gains."
Even if the cause or primary motivation for them meeting is important, they usually need something more. If they feel close to the people they are working with, that'll do it, or at least help. I think you've shown how this can help people's careers, so participants just need a little extra push to seal the deal, it seems.

Ruminating over the feedback Sam presented brought three thoughts to mind. First, I agreed with Sam wholeheartedly that the group lacked cohesion, and that the length in between the sessions was likely a cause. Sam pegged the fact that the group lacked Mink, Mink and Owen’s norm of Trust. In fact, he did not trust that the group was going to come to meetings as stated, and perhaps did not have trust in me as a leader. Second, I understood Sam’s assertion but I knew of no other way to maintain the voluntary nature of the study. Giving the group the ‘push’ that Sam advocated seemed like it went against action learning action research (ALAR) principles, not to mention IRB. It did not, but this was my reasoning at the time. Sam was merely showing his frustration about the group’s dependency on me as a leader. Last, the group seemed to be speaking in subtle, subconscious, and sometimes overt ways. Although I felt stuck in a cycle of obligation, I listened. Continuing to send out Doodle polls, I added personal email reminders to each member on the week before the May meeting and the day of the meeting. I hoped it would serve as the personal touch that Sam suggested.

Table 12 April Group Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Dependency</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td>Dependency was shown in Sam’s frustration with the leader (me) not doing what he felt should be done for the good of the group. The group was dependent on me to schedule and Sam was frustrated by the perceived dependency.</td>
</tr>
</tbody>
</table>

| Sam did not trust the others, and was not certain that I was doing the best thing for the group. |  |

May Meeting

It was quite clear that the group was not going well, particularly in light of the continued scheduling difficulties. Leading up to May’s session, I had decided to shake up the pattern and try something different from previous meetings. The focus was to be a broad discussion about how to help the stakeholder, ATD in the ways that they organized similar groups for novices. The idea behind the change in focus was that members had not fully bought into the action learning process, and the method was becoming forced. I desired to give control back to the members, and I wanted to take the temperature of the group. Members confirmed attendance, yet Harry and Wayne were the only attendees.

During the meeting, the planned structure was abandoned. Wayne and Harry seemed intent on picking up a conversation they had at the beginning of the meetings, in which they discussed the technical problems they faced at work.

Wayne: I was saying, whatever I go with developing new learning, what tools to use, what’s the best medium to reach my target audience and the best way. Those are all things I’m exploring and trying to learn as I go along. So anyone who knows anything I can learn from. So, I’m always happy to partner with others who are trying to accomplish some of the same things and get their opinion.

Harry: What I was asking you about, what meeting place do you like best, what web-meeting place do you like best?

The meeting was short, but before signing off, we agreed I would again send out a poll in order to schedule our next meeting.

I was sure at this point that my facilitation skills or lack thereof, hampered the group. I was eager to solidify plans to form a new group that I hoped could repair many of the early issues with Cohort 1. Thinking back, I did not take Sam’s advice not because I did not agree with him, but because I knew of no other way to revive the group. I was already sending emails
and confirming every week before the meetings and the day before and the day of the meeting. I knew there was a much larger issue than just scheduling at this point.

**Cycle 1: Making Plans for Next Action**

June’s meeting was even more difficult to schedule. I sent out the poll, and a reminder after the date was set. However, only Sam showed up in the Adobe Connect meeting room. Since two was not enough to make a group, the meeting was cancelled. For many reasons, the group never reached a level of trust so that they could move to Working Together, which was the next phase in the Mink, Mink, and Owen hierarchy. As well, the group displayed a passive aggressiveness that could be seen as Fight in Bionian terms. They were fighting against me as leader and showing their displeasure with their absence.

In retrospect, the dilemmas of role duality with my dual positions of researcher, leader, and novice may have created a lack of clarity about the roles of participants and confusion about the goals. As career changers with considerable work experience, these individuals were not like true novices—they were only novices in the instructional design role—and already had a clear repertoire of ways to learn how to do new tasks. Thus, the focus of this team effort on a new way to solve work related problems, the how of learning a new job or task, conflicted with their focus on the what of learning.

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Basic Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started</td>
<td>Fight/Fight</td>
</tr>
<tr>
<td>Norm: Developing Trust</td>
<td></td>
</tr>
<tr>
<td>The most basic norm was never reached in the group.</td>
<td>Members were passively displaying their discontent with the group and me as its leader by not showing up after confirming attendance.</td>
</tr>
</tbody>
</table>

After receiving few replies and very little interest in rescheduling the cancelled session, I assessed the group’s difficulty in meeting on a regular basis, and concluded the group. At the
close of Cohort 1, I continued to reflect critically, in an effort to “anticipate, adapt, and create strategies in response to emerging issues and discontinuities” (Kelleher, 2005).

**Cycle 2: Identifying the Problem**

Even before launching the first cohort, the idea was planted that I might engage two groups of novice professionals in action learning. I planned to conduct one action learning set for those who were novices, but who more experienced in their roles, and another for a set of true novice practitioners. I presumed that there might be different levels of support needed at different novice stages, and I was quite interested in the potential for interaction between the two sets of action learners. Conceptually, I considered there were a number of ways the two sets could work together in their own learning. Cohort 1 could act as mentors for Cohort 2, and in taking the time to impart lessons learned, would set the stage for critical reflection and learning opportunities. This idea appeared to be an effective tool for ensuring real change (Miller, 2003) within both cohorts. Structure within the second set could focus on the individual’s personal and professional goals, and relational skills. After the close of the first cohort, however, I quietly mourned the loss, but made plans to begin recruitment for the second cohort using what I learned from Cohort 2 and my aforementioned notions.

**Cohort 2 Recruitment**

Recruitment for Cohort 2 began in February 2014. The participants, namely Lisa, Travis, Rasheen, Daria, and Marie, learned of and joined the study in disparate ways. Lisa and Travis were referrals from individuals who knew of my study, and Rasheen responded to an online recruitment posted on a National ATD forum for new career entrants. After conversations at an ATD conference and a local monthly meeting, Daria and Marie became part of the study. Rasheen, Travis, and Marie were all Master’s degree students in social services, business, and
Industrial and Organizational Psychology, respectively. Lisa just started a new role in Human Resources. Both Travis and Marie worked in manufacturing, Travis as a Trainer and Marie as an Intern. An examination of their initial questionnaires suggested a difference from the first cohort that consisted mainly of career changers. Many were in their first roles in HRD, and as I had hoped, the new group members seemed to be in an earlier stage of novice development than the first.

**Cycle 2: Making plans for Innovative Improvements and Taking Action**

With this knowledge, additional scaffolding was provided to support the new group’s development in the form of business coaching, which is “typically result- performance, success, or goal-directed and highly practitioner driven” (Parsloe & Wray, 2000), and sets up just-in-time learning opportunities (O’Neil & Marsick, 2014). In addition, functional changes were made to the set design by changing to a set weekly commitment. Instead of meeting whenever the group’s schedules permitted, we would instead meet for an hour on Monday evenings for seven weeks. Other changes were made as well. One week prior to the start of the first meeting, I sent out a welcome email to the group, and attached a workbook on the action learning process. As well, the participants were given homework prior to the first session and were asked to think about the problem they wished to address during the meetings. Each session was also organized with an agenda and accompanying PowerPoint slides. The Adobe Connect invitations were made in advance and queued up to be sent to the participants prior to each meeting. Finally, the flow of the sessions was reconceptualized. Keeping in mind that flexibility was key in capturing action learning in an authentic way, the second cohort launched in July 2014.
Week 1

Early in the first meeting of Cohort 2, Rasheen, Marie, Travis, and Lisa introduced themselves and chose a pseudonym in keeping with the privacy and anonymity promised in the study. The research process and action learning methodology was explained to the group. In a change from the previous cohort, the group was shown the study’s research questions within the on-screen presentation, and prompted for feedback and reflections. When asked, Rasheen and Marie were excited about the possibility of learning in a new way:

When I saw your message, I jumped on it and said oh, man, I've never been part of this and I think that it'll be awesome that you're going to help us or, I guess in a way help us help ourselves on things that are practical and that we can actually do. I'm one of those guys, I think theory is fantastic, but I need something practical. And even if the practical stuff doesn't work or it fails a hundred fifty million times, at least the constant generating of ideas thrills me (Rasheen)

I think it's a neat way of learning about it. I had taken an executive leadership class my first semester and we barely touched on action learning in one of them because it was part of an executive coaching strategy. I was kind of confused as to what it was, and we didn't really go into depth with it (Marie)

Since the first session was intended as a welcome and introduction, the tone of the meeting was relaxed and informational. We discussed the action learning methodology and to conclude, the members were asked to articulate their emerging problems at work, as each of them would need to have some sense of what they would present to the group. Members each identified the problems they would present during the sessions. At the end of the session, Rasheen told us that he posted a quote he liked from Revans (1998) to social media: “There can be no learning without action and no sober and deliberate action without learning” (pg. 83). The lighthearted exchange was a fitting way to end the first session and demonstrated initial buy-in from the set members.
**Group and Coaching Analysis**

The members of Cohort 2 immediately seemed to bond with each other. Their framing of their problems were met affirmatively and the members seemed to “piggy-back” off each other’s experiences. They were in the first stage of Mink, Mink, and Owen (1992)’s norm of building trust. Involving others is one of the hallmarks of the developing trust norm, and the group displayed this by asking each other questions, being respectful of each other’s opinions, and finding parity in each other’s work problems as novices. This week, instead of showing Basic Assumption behavior, they showed the beginnings of becoming a work group. As this week was the first session, I made sure to display O’Neil and Marsick’s (2014) interventions as I discussed the research study, and prompted participants to choose their own pseudonyms to provide anonymity. A supportive environment was also created in providing structure to the meetings going forward as well as asking for feedback and suggestions from the group.

**Table 14 Week 1 Group & Coaching Analysis**

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Getting Started Norm: Developing Trust</td>
<td>Work Group</td>
<td>Situation: Creating an environment for learning Intervention: Emphasize confidentiality Create supportive environment</td>
</tr>
<tr>
<td>Initial stage of developing trust by expressing parity in work problems.</td>
<td>Initial stage of work group focusing on work task</td>
<td>Created through choosing pseudonyms and introducing research</td>
</tr>
</tbody>
</table>

**Week 2**

At the start of week 2, I introduced a new member who had contacted me in the intervening week. Daria chose her pseudonym and explained to the group her initial problem. The meeting began, as it had in the previous week, by a framing of the study’s questions and
making a request for feedback. This week, members were asked to explain the problems they had as novices, specifically within their new roles. Travis spoke about application:

> From my experience, you can only teach so much in a book, and I think once you start and you actually get into [a] role, you pick up so much more. So sometimes there are certain theories and stuff that you might learn in school, but until you get into that specific role you can't really apply that stuff. And also, it's not [that] it's not relevant but it's just a whole other ball game (Travis)

Marie had not had issues with application, but instead on “picking up on the stuff that I didn't learn in my curriculum.” Rasheen did not previously have an understanding of exactly the tasks he would be expected to perform, and Lisa felt she did not know the terminology well. Daria said that the particulars of the role were eluding her: “I've done this kind of a role before, but . . . it's like learning a totally new language.”

As Travis was the first volunteer, he began by framing his case. Table 15 shows his initial problem, assumptions and actions. He stated his problem asked how he could make others in the organization understand his role. After questioning, Travis realized his problem was actually internal. He had a “problem sometimes overcoming those expectations that people have of me”.

Table 15 Travis’ Case

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travis</td>
<td>How can I get others to understand how important my role is to the overall success of our organization?</td>
<td>How can Travis get over his feeling of being underappreciated and unprepared for the technical trainer role?</td>
<td>1. Travis assumes people want him to be the expert. 2. Travis assumes he cannot fill the role. 3. Travis assumes he has no clout</td>
<td>1. Brush up on technical terminology 2. Set up a meeting each week with certain managers, just to see exactly what that area needs.</td>
</tr>
</tbody>
</table>
Further questioning from the group led to Travis an understanding of some of the assumptions he was making. As the final exercise, Travis came up with an action plan of proactively meeting with managers.

I think that I could probably start off setting up a meeting, or two meetings a week with maybe certain managers, just to see what exactly that area needs. What is it that Travis can offer? So they can see well, he is taking an initiative; he's taking two steps forward and stepping up to the plate (Travis)

Travis was to report the next week on the actions he actually did take.

**Group and Coaching Analysis**

This week, the group members started to disseminate opinions, and display their individual differences in keeping with Mink, Mink and Owen (1992)’s norm, and moving towards Phase 2. Even with the addition of a new member starting this week, the group accepted Daria. Light banter within the group and sharing of personal information meant that trust was beginning to form among the members. No Basic Assumptions were evident and the group seemed to work well and be respectful of time and each other. The work of the group was being accomplished, and no dysfunction was apparent, which are indicative of Bion’s Work Group behavior. As the second meeting and the first with action learning, I used many of the coaching interventions. In addition to the previous interventions of emphasizing confidentiality and creating a supportive environment, I also began to take the members through the action learning method. Using questioning insight, the members interrogated each other’s problems and assumptions. At the end, I asked for feedback and reflections on Travis’ case.
### Table 16 Week 2 Group & Coaching Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1-2: Working Together</td>
<td>Work Group</td>
<td>Situation: Specific interventions for learning</td>
</tr>
<tr>
<td>Norm: Individual Differences</td>
<td></td>
<td>Intervention (s): Use questioning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use reflection</td>
</tr>
<tr>
<td>The group disseminated opinions and shared information, and showed they were beginning to trust each other</td>
<td>Work Group behaviour in absence of Basic Assumptions or dysfunction.</td>
<td>Questions were prompted from the group using AL methodology and requested reflections on learning after Travis’ case.</td>
</tr>
</tbody>
</table>

### Week 3

The third week of sessions started in the same manner as previous sessions. Set members were on time, and chatted before the group came to order. I asked Travis to reflect on what he learned from last week:

I did learn. I didn't get to actually put the steps and actions of things I decided or that I thought that would be best to help me move forward as far as setting up meetings with managers—didn't get to set those wheels in motion just yet, but I did learn a lot.

Rasheen also had reflections on Travis’ case. He spoke of being confronted with an issue similar to Travis’ and though he saw the necessity, he felt challenged to act in the moment. I include the following exchange to illustrate that action learning affects not just the case holder, but also all of the set members. Not only that, but the dialogue displays the coaching methodology as well.

Rasheen: Thinking back, it was like man, we gave Travis all these action steps and here am I in a very similar situation and not using the stuff that we talked about.

Angie: Oh, so at least it made you think about where you were in that situation and what you might do next time?

Rasheen: Right.

Angie: So what are you going to do next time when you're confronted with something like that?

Rasheen: Say something . . . maybe I could slow the conversation down and say what I have to say.
Again, the dynamics of coaching are shown by slowing down the coachee’s thoughts and providing time for reflection (Allen, et. al., 2011). The importance of the coach being reflexive, and “maintaining the ability to experience and reflect on one’s own inner world at points of heightened emotion” is critical to the coaching relationship (de Haan, Bertie, Day & Sills, 2010, pg. 8). Being able to relate and reflect on my own experience in the moment to draw out the participants’ reflections and learning was a skill that became sharpened over time within the action learning sets.

Marie’s case is shown in Table 17. She began with a discussion of her perceived problem with having little technical knowledge in her new role. She said, “my fellow employees [are] very supportive, they'll always tell me oh, you did a good job, all this stuff. But I can tell they'll give me little hints.” With the group’s help through questioning, she reframed her initial inquiry. She discovered that the problem was not in others’ expectations, but that she was putting too much pressure on herself. Her assumptions played into her harsh view of herself.

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marie</td>
<td>How can I increase my knowledge of the technical aspects of working at a manufacturing plant to a level equal to or greater than the more senior employees can?</td>
<td>How can Marie quiet her feelings of internal pressure to be perfect and need to stay in control?</td>
<td>1. Marie assumes she is incompetent because she does not know the technical information. 2. She assumes people think the way she does about herself. 3. She assumes she represents the entire field of HR/OD.</td>
<td>1. Seek help from mentor 2. Be kind to yourself in expecting too much, too soon. 3. Do not put pressure on yourself to get everything right the first time 4. Try mindfulness</td>
</tr>
</tbody>
</table>
The idea of perfectionism circulated in the group, as did mindfulness. Both were seen as possible ways to deal with the feelings of stress:

Marie: One of the things I've always wanted to do but I never seem to do it at the time is if something like that happens, whenever I get a chance to break, just go to a restroom or something, just go somewhere where I can take a few seconds to breathe. Because breathing helps me out a lot. If I feel stressed, even on the car rides, I'll just take a few breaths because that's what I've learned in yoga, just take those breaths in and kind of let everything go.

Daria: You might want to also look into mindfulness. I don't want to say mindfulness therapy, but it's - you've probably heard of it, but it's a way to help de-stress yourself and then you can go back to whatever the issue was that you were having trouble with and it's a little bit easier to deal with after that.

Marie: Yeah, yeah. I've been meaning to look into it, too. One of my friends has been suggesting it forever. So I could definitely look into mindfulness, for sure.

Angie: Do you do that, Daria?

Daria: I do, yeah. Yeah, my last position was really stressful and I'm very much like Marie, very much a perfectionist and was putting a lot of unnecessary pressure on myself. I was working with someone who told me about it so I looked into it and when I remember to do it, it is very, very helpful.

At the end of the session, Marie pledged to take action by seeking a mentor, giving herself a break, and trying out the mindfulness technique. She felt getting over her ego was a key part of the issue:

I know over time I'll learn, but it's got to be something I have to be willing to ask and to get more details and just being embarrassed that I may not know the information.

Because the end goal is to help and I've got to get over my pride a little bit and maybe seek out that help (Marie)

As a closing reflection, Lisa felt a kindred spirit in Marie’s use of mindfulness: “that's a very good technique. I feel stressed at work, so sometimes I feel like that choking sensation that I can't speak. I experienced it lately and I know exactly how you feel, Marie.” Rather than the coach working individually with each person, at times the group comes in contact with one another, thereby tapping into the similarity of experience that they have, and sharing their
knowledge (Schueller, 2014). In the intervening week between the sessions, I reflected on the idea of perfectionism and sent an article about the Imposter Syndrome to the group. A Forbes article entitled, *Afraid of Being ‘Found Out’: How to Overcome Imposter Syndrome* (Warrell, 2014) introduced the concept of Imposterism, and I was curious to see if they related to it in the next meeting.

**Group and Coaching Analysis**

This week, the group was firmly in Phase 2 of the Mink, Mink, and Owen (1992) continuum. There was no evidence of anything other than Work Group behavior. As coach, I was becoming facile at knowing how much to push each member to draw out reflections.

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2: Working Together</td>
<td>Work Group</td>
<td>Situation: Transfer skills needed for learning</td>
</tr>
<tr>
<td>Norm: Giving Feedback</td>
<td></td>
<td>Intervention: Help participants to give and receive help and feedback to each other</td>
</tr>
</tbody>
</table>

The group was beginning to coalesce. The interaction between Daria and Marie about mindfulness showed a keen interest in adjusting to new information or data.

| Displayed work group behaviour with a task focus | Facilitating the exchange on mindfulness helped to set the stage for awareness and perhaps learning. |

**Week 4**

Another discussion on mindfulness started week four. Lisa researched the technique but was confused. Daria explained to her:

Daria: It's really just taking the time to pay attention to where you are and what you're experiencing in the moment. Because I have a tendency to get carried away in my thoughts and if something goes wrong at work, I'll concentrate on that and just focus and all my thoughts are devoted to that. And when I take a step back and just try to pay attention, if I'm outside, what is around me, looking at the trees, looking at just simple stuff that I normally would probably just walk right past. It
actually really kind of helps me to focus on something else and then I can go back and approach the problem a little bit of a calmer manner. But like I said, I have to remember. I have to consciously make an effort to use it because I don't always do that.

Lisa: Yeah, I tried with my breathing and it's very hard because I keep getting carried away.

Daria: I just have to take the time [during the] 10 minute walk between my parking garage and where I work. Just pay attention to the building, the colors, the sounds that you're hearing and it does work. It'll take your mind off whatever the issue is that you were focusing on before.

This week, Marie was on vacation, so there were no case holder reflections. Nonetheless, I read from the article I had previously sent out to spur conversation about Imposterism.

Angie: What did you guys think of the Afraid of Being article? Kate Winslet, the actress said, “I wake up in the morning before going off to a shoot, and saying I can't do this; I'm a fraud”. Then Don Cheadle said, “All I can see is everything I'm doing wrong, it's a sham and a fraud”. So how does that resonate with you guys being novices and being the most of us being perfectionists?

Daria and Travis had similar thoughts in their belief that Imposterism can steal ones’ confidence and sense of self. While Lisa enjoyed the article, she did not connect with the idea of Imposter Syndrome. I offered an example out of my own experience: “everyone feels like I’m wonderful but inside, sometimes I feel that I really don't know what I’m doing”. Daria agreed, and mentioned that she had similar thoughts and feelings. Next, she began to present her case, the details of which are shown in Table 19.

Initially, Daria wanted the group to help her figure out how she could be busier in a job in which she was overqualified. After the action learning process, Daria reframed her problem and realized she was afraid of getting back out into the job market so soon after long-term unemployment. Daria made several assumptions including the idea that she thought job-hopping was inherently bad.
I'm definitely afraid of being unemployed again because that was awful. Just not knowing where your next paycheck is coming from and trying to sell yourself in a job market that is still very tough. I know I'm overqualified for the job. And yeah, I am afraid. I'm afraid to say anything and I'm trying to kind of maintain a low profile because of that (Daria)

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
</table>
| Daria      | How can I demonstrate that I am ready to assume more/greater responsibility in my new role? | Should Daria leave the job she’s overqualified for or approach her boss about a role change? | 1. Daria assumes job hopping is bad.  
2. Daria assumes she will lose her job if she tells them she is overqualified and bored.  
3. Daria assumes her job search will be long. | 1. Look for opportunities to expand role  
2. Start the job search  
3. Look for professional group meetings to attend  
4. Try alternate ways to obtain ID software |

With a promise to make some industry contacts as her action item, we closed another weekly session.

**Group and Coaching Analysis**

The addition of “homework” in the form of the Imposterism article served a few purposes. Interventions such as these are a key part of action learning. As both a process and a program, action learning solves real problems and invites set members to focus on what they are learning as well as how their learning can benefit each group member and the organization (Marquardt, 1999, p.4). First, as a coaching intervention, it set up the idea that the work of the group could be made visible. By providing something they had to read and digest, the group was showing that they were doing the work that they came to the group to accomplish. As a phase of group development, it showed that the group could define problems together and work on solutions, which moved the group forward in their development. Second, the article allowed for
a way for them to think differently about how they were feeling. Many expressed shock that the article placed a finger on the pulse of what they had experienced in the way of perfectionism and Imposterism. The group again displayed no signs of Basic Assumptions, even as one of the members was absent.

**Table 20 Week 4 Group and Coaching Analysis**

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situation</th>
</tr>
</thead>
</table>
| Phase 2-3: Working Together & Producing/Unity  
Norm: Solving Problems | Work Group | Situation:  
Specific interventions for learning  
Intervention:  
Use just-in-time-learning  
Make work visible  
Create ways to help think differently |

The group worked well together to define and identify Imposterism in themselves. The article was evidence of just-in-time learning as I recognized the need to discuss and presented them with the task. The Imposterism article set up visible work for the group. The group worked through the “problem” of seeing themselves as imposters and “solved” the problem through discussion and support.

**Week 5**

To start week five, Daria reported to the group that she had indeed taken action over the previous week.

I did take some action. I actually reached out to someone that I know through the SHRM organization and met with him and got some advice on starting my career search again, and got his thoughts and he gave me some other contacts. So, I reached out to those people today to try to set up some informational interviews. I am starting to move forward (Daria)
This week was Rasheen’s turn to present his case, and he brought the issue of his micromanaging boss to the group for assistance, shown in Table 21. He discussed her increasingly dominant management style and was pleased that the group knew of what he felt: “even talking on the phone, you all feel what I feel.” Rasheen’s problem was restated to one concerning his communication style with his boss. When pressed for more information about how he was dealing with the issue, he said the thought about quitting a few months prior, but no longer felt that way. Lisa pointed out that this might no longer be a problem for Rasheen, as he related that it used to be a problem for him in the past.

Table 21 Rasheen's Case

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rasheen</td>
<td>How do I deal with a boss who is a micromanager?</td>
<td>How does Rasheen figure out better ways to be okay with being micromanaged?</td>
<td>Rasheen’s assumptions were not explored</td>
<td>1. Continue to seek opportunities to learn from your boss. 2. Be intuitive 3. Self-care 4. Wait them out</td>
</tr>
</tbody>
</table>

As the group began to ask questions, we devolved into a discussion about micromanagement. In this case, we did not ask Rasheen to develop a list of assumptions he might be making. Seemingly, Rasheen had not picked a problem that was urgent or immediate. According to Pedler (2010), questions should be of sufficient magnitude and should be “hitherto intractable” (pg. 11). To be successful action learning problems should place a high value on personal experimentation and reconsideration (Garratt, 1997). That Rasheen’s problem had already been “solved” by him led us to use a technique called question storming to help him generate alternatives for communication with his boss.
As Lisa astutely pointed out, Rasheen’s problem was not sufficient. There were many ways to handle the situation that was not evident until after reading the transcript. Rasheen could have rephrased the question, choose a different problem with more weight, or the group could have dig deeper into reframing the problem or assumptions, or the session could have even turned into a role-play. Because Rasheen’s boss was due to be out of work on an extended medical break, he felt that waiting for them to leave was an action in and of itself. Rasheen also thought he could be very selective and deliberate in his communications with his boss. While not entirely injurious, Rasheen and the rest of the group would have benefitted from a better definition of the problem he brought to the group, and perhaps keenly directed questioning about his assumptions.

**Group and Coaching Analysis**

That Lisa caught the fact that Rasheen’s problem was no longer an issue for him was evidence that there was trust in the group, and that she had developed critically through action learning. The coaching intervention that made most sense was to stay silent and allow the group to process Rasheen’s case. Since the group was blending well, the misstep was not detrimental, except that it became a lost learning opportunity.

**Table 22 Week 5 Group and Coaching Analysis**

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 3: Producing/Unity</td>
<td>Work Group</td>
<td>Situation: Transfer skills needed for learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Intervention: Say nothing and be invisible</td>
</tr>
<tr>
<td>The group was working well together by this point. Outcomes of growth were seen in Lisa’s assertion that Rasheen’s case had already been solved. She understood the AL methodology and felt that something was amiss.</td>
<td>Displayed work group behaviours</td>
<td>Once it was clear that Rasheen’s problem was already solved, it made sense to stay silent and allow for the group to learn through the case.</td>
</tr>
</tbody>
</table>
To start the sixth week, the study’s research questions were again discussed, and reflections or actions were reviewed from the previous week. I started with one of my own workplace and told the group about a discovery I made in feeling blocked in my role. Daria’s perceptive observation connected my learnings to her own:

What does Kenny Rogers say? You have to know when to hold 'em and when to fold 'em. You have to know what your limit is and, like you just said, understand it. Quite possibly, you're not going to be able to affect change and are you okay with that? Do you want to work within with an organization that's like that? Can you deal with that? Or do you want something more? So, I think it's just about knowing yourself and what you're - what you are willing to accept.

Lisa was to present her case next (see Table 23). Her boss was going out of town and left her in charge of the hiring team, and she was understandably nervous, as she had never led such a group. We began the action learning process and began to frame the problem, then reframe and move into assumptions. This problem was different, however, in that it was based on skill and confidence. I suggested we do role play in order to help her practice. Role play in this instance was used as a coaching instrument in order to assist in experiencing feelings and practicing skills (Silberman & Auerbach, 1998). Although Lisa was hesitant, Travis thought it would be an excellent idea. He read an ATD article earlier that day and, thinking the content applicable, read it to the group. In some way, Travis’ article quotes broke the ice.

With that, the group began to act as Lisa’s interview team. We each naturally took on a role and Lisa guided the team to make a decision on a simulated candidate. At the end of our role-play experience, the group was complimentary of Lisa’s handling of the learning opportunity. The reflections immediately after the role-play were positive. Rasheen thought it was “awesome”, and offered Lisa a pep talk, saying “the more comfortable you get at it, the
more comfortable it'll be”. Lisa thought it helped her and said, “I really like the idea that we did the ‘fake’ facilitation”. That the group provided unilateral support of Lisa and enthusiastically participated in the role play solidified Cohort 1’s cohesion and productivity.

Table 23 Lisa’s Case

<table>
<thead>
<tr>
<th>Case Holder</th>
<th>Initial Problem</th>
<th>Restated Problem</th>
<th>Big Assumption</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa</td>
<td>How do I communicate effectively as the facilitator of the interview group?</td>
<td>How can I practice</td>
<td>Lisa assumes her communication skills are lacking.</td>
<td>1. Practice</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2. You can admit that you are new, helps to clear the air</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3. Look at it as a great learning experience</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4. Ask for feedback</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>the more comfortable you get at it, the more comfortable it'll be</td>
</tr>
</tbody>
</table>

**Group and Coaching Analysis**

This week the group rallied behind Lisa when her case brought up her fears about leading a staffing group, in which she had no experience. The group quickly responded to the role-play suggestion and each contributed to the effort. The coaching interventions according to O’Neil and Marsick (2014) allowed for the transfer of skills Lisa needed to learn, and as it turned out, Lisa used them the very next week when she led her work team. The participants modeled good feedback skills for Lisa and themselves. Some expressed that the role play was a good reminder and reinforcement for their own roles.
Table 24 Week 6 Group and Coaching Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 3: Producing/Unity</td>
<td>Work Group</td>
<td>Situation: Specific interventions for learning</td>
</tr>
<tr>
<td>Norm: Solving Problems</td>
<td></td>
<td>Intervention: Use just-in-time-learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Challenge the team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Situation: Transfer skills needed for learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Intervention: Help participants to give and receive help and feedback</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Help to learn how to transfer learning</td>
</tr>
<tr>
<td></td>
<td>No dysfunction</td>
<td>The role play with Lisa evidenced just-in-time-learning when she mentioned that she did not know how to facilitate a group. She used the skills learned the next week.</td>
</tr>
</tbody>
</table>

If not for the trust building in previous stages, Lisa’s role play would not have been successful. Travis’ providing new information demonstrated that members of the group were now feeling responsible for adding to the learning. The group was working optimally.

Week 7

Week 7 was the concluding meeting. Daria, Lisa, and Travis attended, and expressed disappointment that not everyone showed up for the last meeting. The session was intended to be a celebration and recap of our sessions, as well as a look forward to how the set members felt they could use action learning in their new roles at work. Nonetheless, the three in the room were excited about what they learned during the set, and reflected on the experience:

Daria: I really just enjoyed hearing everybody's own little individual issues because it made me feel better that I'm not alone. I feel the same way that everybody else feels and when I try to do something new or take on a new task or whatever, we all have the same set of similar issues that we don't want people to think that we're not qualified to do what we're doing. So that was nice from my standpoint, and I also got some good reminders with the role modeling and just think of those sorts of things when you go to your manager and ask for help.
Lisa: I think that I really like this whole activity, just because I felt like I was not alone and also it's a reminder that it's okay to be a novice and it's okay to make mistakes and just learn from the mistakes. Also [it is important] to not be afraid to talk with your boss, because I did have a hard time bringing up this issue or problem to my boss. But really, communication is the key to a lot of things, so I feel like this is a great reminder for that.

Travis: I'm going to piggyback a little bit off of Lisa. I agree. I think it is okay with being a novice; you have to know that you have to start somewhere and why not the beginning? It’s the best place to start. And, going through different things in the workplace, it gets you prepared for something bigger in your future and it's about going through certain things and saying, “I went through that and I have this little piece in my toolbox that can help me figure this out.” So, when a different situation arises, you've gone through that situation before and you have something in your background to help you through that, and I think that's the winning piece of it all.

**Group and Coaching Analysis**

The absence of two members affected the remaining members greatly. Both the missing members as well as the members present were unhappy with the missed opportunity. Its stated goals accomplished, the group was in Mink, Mink and Owen (1992)’s final norm of letting go, and in the final phase of Producing/Unity. As a coach, I needed to soothe the group after they expressed disappointment in the absence of their group mates. Making reflections on the entire action learning coaching process turned the attention away from the loss of the other members, and refocused the individuals to look within to consider what they learned and what they could apply to their roles.
Table 25 Week 7 Group and Coaching Analysis

<table>
<thead>
<tr>
<th>Mink, Mink &amp; Owen’s Phase</th>
<th>Bion’s Work Group</th>
<th>O’Neil &amp; Marsick’s Coaching Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 3: Producing/Unity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norm: Letting Go</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Group</td>
<td></td>
<td>Situation:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Creating an environment for learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Intervention:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create supportive environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Situation:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Specific interventions for learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Intervention:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use reflection</td>
</tr>
</tbody>
</table>

The group as a whole was in the final stage of development. After achieving their goals, group members began to retreat from the group. Two members experienced personal issues that prevented attendance at the last meeting. Both expressed dismay in missing the meeting. The group was disappointed in the two member’s absence, so creating support for them was needed. As coach, I elicited their reflections on the process as a closing exercise.

Cyce 2: Making Plans for Next Actions

The exit interviews and stakeholder presentation constituted the final steps in the action learning action research (ALAR) process. Although interviews with the set members occurred immediately after the conclusion of the second cohort, the stakeholder presentation to Association for Talent Development (ATD) leadership did not take place until the next spring. As an all-volunteer organization, ATD elects its board of directors annually. A new board was installed at the beginning of the year and due to budget meetings, we could not immediately get on the schedule to present the recommendations.

One of the tenets of ALAR is that there is a public display or presentation of study findings. Zuber-Skerritt (2002) offers oral and written presentations as vehicles for individual and team learning, reflection and conceptualization (pg. 146). Action learning sessions that forgo public presentation produce learning that is transitory, unnoticed, unappreciated and unrewarded (Zuber-Skerritt, 2002). During the sessions in both cohorts, the idea of public
presentations were suggested and discussed. Blair, a cohort 1 member, proposed that the group members develop an eLearning course in Articulate Storyline, a rapid authoring tool for instructional designers.

**Cycle 2: Interpreting Results**

When the presentation and recommendations were sent out to the set members for feedback and accompaniment to the meeting, there was only one response from the study’s participants. Travis responded accordingly:

> ATD partnering with colleges/ universities is an awesome idea! Post-secondary education focuses so much on concepts and theories that they often fail to address the stress, intimidation, and fear of being “found out” that the student may face when entering the work environment. I believe if I were taught and informed that it is ok not to know everything, my transition into the work environment would have been easier. We all want to be experts, but have to realize it takes time. Thanks for allowing me to be a part of your research.

Due to prior scheduling conflicts, Travis could not attend the meeting but offered to record a message about his experience to be embedded into the presentation.

**Stakeholder Presentation**

At the ATD board meeting, I presented recommendations to the board of directors.

**Recommendation #1.** Develop an Action Learning Boot Camp program to reach early career entrants, delivered by experienced action learning coaches. There was a novice retreat a couple of years ago. It was formal education, and may not be enough to help new entrants develop those inward-looking skills they need. It is difficult to make meaning of being new when you do not have a repertoire of experience to draw on. Moving from formal to mixed offerings to novices promotes long-term engagement for novices within the association.

**Recommendation #2.** Collaborate with local colleges for a bridge program to ATD for new Human Resource Development/Organizational Development (HROD) practitioners. There are seven local colleges around this area, and many have HROD or Industrial/Organizational
Recommendation #3. Integrate action learning coaching into annual board retreat. If you have an annual retreat, or if you find you have an intractable organizational problem, action learning methodology can help. Integrate action learning in a deliberate manner.

Summary

This chapter chronicled the action learning action research (ALAR) case study. Running concurrent to the research story of 10 novice participants were the ALAR cycles of identifying the problem, making plans for innovative improvements, taking action, interpreting results, and making plans for the next actions.

Group dynamics were certainly evident within the study, and played a large role in the outcome of the sets. Mink, Mink, and Owen’s (1992) three phases of group formation include Getting Started, Working Together, and Producing Unity. Each phase has norms that must be followed in order to move on to the next level. Cohort 1 never progressed to the second stage, and did not develop the norm of trust within the group. Cohort 2 cycled through all of the norms and stages during their time together. While the differences between the groups were negligible, only one cohort persisted as an intact group. Wilfred Bion (1961) would describe these groups as manifestations of workgroup and basic-assumption group behaviors. Workgroups cooperatively take on the tasks that allow the group to function properly, as was seen largely in Cohort 2’s performance and sustainability. Basic assumption groups often exhibit ineffective and contradictory behavior, as seen in Cohort 1. As not to advocate a “good group vs. bad group” mentality, I assert that manifestations of basic assumption behavior were seen in both.
groups at different times and quantities. However complex Bion’s group level behavior, the concepts are based on a relatively simple observation that some groups ‘work’ and some do not’, or more accurately, “no groups work to optimum effectiveness all of the time, but neither is any group entirely dysfunctional” (French & Simpson, 2010, pg. 4). Finally, the preceding case study was shown to benefit from coaching and O’Neil and Marsick’s (2014) coaching interventions were used to exemplify coaching instances within the story.
CHAPTER 5

FINDINGS

Qualitative analysis transforms data into findings. While the path may be shown, the final destination remains unique for each inquirer, known only when—and if—arrived at (Patton, 2002, p. 432). This study takes the view of action learning coaching as a means to facilitate personal and professional development for novice human resource development (HRD) professionals in the workplace. Sponsorship from a local ATD chapter afforded opportunities to not only support kindred professionals, but also provided the platform to suggest structure for novice support groups within the association’s framework of professional membership development. This chapter presents data collected from an initial survey instrument, virtual, synchronous action learning set meetings, and individual interviews. Through data analysis, the findings presented here are organized by and endeavor to answer the study’s three research questions: (1) How do novices construct the challenges they face in their new roles? (2) How do novices make meaning of their participation in action learning coaching? And (3) what systemic changes will novices make in their professional practice as a result of participation in action learning?

Finding #1: Novice Challenge Construction

The first research question asked, “how do novices construct the challenges they face in their new roles?” To compile common problems faced by those new to their roles, coded data were derived from the initial open-ended questionnaire and the participant’s own reports of the issues they faced, asked during set meetings and individual interviews. The problems expressed
related to three predominant themes. The manifestations of the novices’ construction of the challenges were related to stress, self-concept, and their jobs. Table 26 shows the larger themes and subthemes that emerged upon analysis. Examples of comments from participants are presented to illustrate their perceptions for each of the categories.

**Table 26 Findings from RQ1**

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Themes from Data Analysis</th>
</tr>
</thead>
</table>
| RQ 1: How do novices construct the challenges they face in their new roles? | • Stress Created Challenges for Novices  
  o Feel overwhelmed  
  o Experience pressure  
  o Expectation setting  

  • Novices Experienced Problems with Self-Concept  
  o Feelings of Inadequacy  
  o Imposter Syndrome  
  o Lack confidence  

  • Novices Reported Job-Related Problems  
  o With technical skills and knowledge  
  o In finding and keeping jobs  
  o Relationships with managers |

**Novice Challenges Created by Stress**

Overall, feelings of stress, tension, and anxiety permeated the novices’ discussions of the problems they experienced in new roles. These were manifested through the subthemes identified by novices as being overwhelmed and feeling pressure. There were also problems in setting expectations, both on their own and from others. Participants voiced these concerns as shown in the section that follows.

**Feeling overwhelmed.** Wayne came to the action learning set with significant professional experience, but was in the midst of a switch to new areas of responsibility. In one meeting, Wayne expressed that his experience teaching as a subject matter expert once provided a crutch that allowed him to know more than anyone else in the room. For him, starting from
scratch was more difficult. In his new role, he was responsible for the entire training department, and had less support than he would like. He said, “I am the training department, and I've lost my mentors. I’ve lost my teachers I could touch and ask my questions of.” His foundation removed, Wayne’s unease was palpable when he said, “I'm in a position right now that I don't even know what I don't know.”

Blair revealed similar feelings of being overwhelmed by a new role. With a recent transition from being a training manager to owning her own business, Blair also lost her support staff: “I had a large group of professional designers that actually designed what we did, but now that I'm in business for myself, I have to do it.” Like Wayne, Blair spent years in the role of the expert who knew what to do. Suddenly forced to do everything herself without support, the switch from training to instructional design has been difficult. Blair expressed, “I am a true novice with, where do you start?” Harry, in presenting his problem, said:

Quite honestly, it is sitting at my desk and looking at the tasks I have to complete and feeling overwhelmed, and really looking at how to begin, how much time to devote to each piece of it on a given day. And how do I not only accomplish what I want to accomplish, but make sure that I accomplish the goals that my entire department sees as the end here?

As can be the case when a set member presents an action learning problem to the group, the real problem differs from the original. The group asked questions in an effort to get Harry to dig deeper into his problem. When pressed further, he admitted:

As with anything and anyone, there’s a fear of failure there, there’s a fear that I’m going to put a lot of time and effort into something that’s just not going to deliver. That I’m going to go out and put forth this training to the people and either they are going to get bored and fall asleep, they are not going to learn anything from it, and worst yet, they are going to take my training, implement it and it will bring them to failure, and possibly through no fault of their own.

**Feeling pressure.** Closely related to the subtheme of feeling overwhelmed is that of the novices feeling pressure. In some cases, the pressure came from external sources, as you would
expect from embarking in a new role. However, many of the novices put undue pressure on themselves to perform.

Rasheen experienced pressure from a legal standpoint: “as a trainer you [have a] high liability. If something happens, you are liable. Somebody can sue not just the company, they can sue you too because you're the one who trained them.” His pressure external, Marie’s pressure was self-inflicted: “I put a lot of pressure on myself to be a perfectionist, to get everything right the first time so that I don't seem like I am incompetent in any way by not knowing the technical knowledge.” Marie described her problem with pressure as a physical sensation, and it led to negative self-talk: “you know that gut feeling you get when you feel like something is about to go wrong? That's what I feel whenever I feel that pressure.” Harry, as well, felt internally placed pressure. The case he presented during the action learning set initially centered on his desire to design appropriate training. His “over detail-oriented” self-description was telling: “I really do assume that I have to do it all on my own, or at least have a final say in what goes on. It’s certainly a struggle.”

**Setting unrealistic expectations.** Some of the pressure the novices felt was caused by unrealistic expectations they placed on themselves. Marie’s case during the action learning set focused on her lack of technical acumen, specifically in a manufacturing setting. In her initial problem, she wanted to focus on learning more about herself, noticing, “while I have all those great soft skills, I lack the technical skills that come along with working in a manufacturing environment.” In Marie’s opinion, the problem she faced as a novice was her slow internalization of dense technical knowledge: “I've been there for two, what almost three months and, I don't know, I just feel like it's not enough. I feel like I haven't learned enough in the time that I've been there.” Despite the acknowledgement that many of the technical experts in the
plant were more than 30 years’ her senior, Marie offered: “I guess I just have expectations of myself and I feel like I’ve been out on the line a number of times and it's still not fully sticking with me”.

Marie felt she was not living up to her own expectations, and projected that feeling onto her supervisors. She told the cohort, “I think they really want me to push myself to learn a little bit more about what goes on in the plant,” despite being too new to have had a formal review of her performance. Working in a similar manufacturing environment, Travis was constantly compared to his more seasoned colleague who had since retired. The colleague continued to be admired and trusted to deliver the technical information that Travis could not. This, he felt, made others set expectations that he could never achieve. He lamented:

I have a problem overcoming expectations of others just because I have so many different people expecting so many different things from me and there's no way that I can meet all those expectations and there's no way I am going to be my predecessor

Problems with self-concept. Another problem described by the new professionals dealt with their self-concept, which includes the subthemes of inadequacy, Imposterism, and confidence. Set members acknowledged a feeling of inadequacy in accomplishing their new roles. In addition, after an introduction to an article on Imposterism in which individuals view themselves as an impostor if they fail to internalize their success (Harvey, 1981), the novices recognized its traits as problems they experienced. A pervasive lack of confidence was the final subtheme associated with novice self-concept issues.

Feeling inadequate. In their first roles in the workplace, both Travis and Marie had problems feeling competent enough to do their jobs. Travis identified: “a problem I had when I started is how do you establish credibility when you're new, young, and inexperienced in the industry?” Marie echoed with, “That’s actually something I'm dealing with now. People look at me and say, you are young, just out of college. What can you bring to the table?”
When asked about his work problems, Travis was somber: “I feel as if I'm not valued as part of the team to make the whole picture or to make everything flow together. I don't think they get an understanding of what it is that I do.” His views from a wider organizational perspective were even less flattering: “being a novice I think you probably are going to run into this situation a lot, just because you're going into an organization where you probably feel like you're the underdog.”

**Imposter syndrome.** After one of Cohort 2’s action learning sessions, the group read an article about Imposterism to spur discussion and reflection. At the next meeting, Daria immediately agreed that she could identify those tendencies in herself. She said:

I feel that way in my current position from time to time because I came to this job with a lot of experience but my boss that I support, he's very nicely continually singing my praises, saying he's so happy to have me and saying to everybody how much experience I have and where I came from and all of that. But at the same time, I just sit back and think oh, my God, I hope that he doesn't regret picking me for this job. I hope I'm as good as he thinks I am. So I totally related to that.

In the session in which she brought her case, Daria expressed classic Imposterism. She stated, “I'm afraid of people finding out that I don't know or that I'm not qualified to do what I'm doing.” Daria also expressed fear:

I feel the same way that everybody else feels when I try to do something new or take on a new task or whatever, we all have the same set of similar issues that we don't want people to think that we're not qualified to do what we're doing.

Lisa, who did not directly see the connection upon first reading the article, reflected on the concept and ascribed her feelings to that of an imposter. She said in a later session, “I don't know if, they're going to find out I know nothing [that] I'm not to that level of knowing how things are supposed to go.”

**Confidence.** Travis experienced problems caused by a lack of confidence when he moved from being an intern to a full time trainer. In his session, Travis originally wanted to
know “how do you get other people to understand how important your role is?” He believed his problem stemmed from people not knowing the difference between his job, which had been redesigned, and that of a previous colleague who held the job for years before retiring. His confidence shaken, he was even frightened to identify with the position: “I was not ashamed, but I was kind of afraid to even use the word trainer to describe my role.”

Travis was not the only member lacking in confidence. Although the group assured her otherwise, Lisa assumed that she was being judged when she spoke because of her accent. Offering a bit of background on her reality as a non-native English speaker, Lisa disclosed, “I feel like a lot of people when I talk to them face to face, they kind of give that kind of attitude.” Her uncertainty in this area affected her at work, as well. Lisa thought that she had a problem expressing herself when she first started with her current company.

Problems at Work

While problems like those already addressed can be considered internally focused, many of the problems addressed by the group stemmed from how they dealt with external forces. Under the larger theme of work-based problems were subthemes of having technical problems, of needing to find or maintain work, and of having problems with managers. The novices expressed frustration and listed problems caused by their inexperience in understanding technical jargon and applying work knowledge.

Technical proficiency. Marie, in discussing her lack of technical knowledge described having to brush up on years of engineering that she had not been exposed to, but had to apply into her job as trainer and coach. Travis, who also worked within a manufacturing setting, voiced a similar issue: “I totally agree with Marie. I'm not an expert and I do need to brush up on some of the technical skills and different processes that we have there.”
Harry was concerned about the mechanics of his role in training and development. He wanted to know how to design a training program, his problem specifically landing on being effective as a new trainer. His lack of technical knowledge was one of the reasons he cited for joining the group, and he was keenly interested in putting together an effective training program for his company. Wayne originally came to the group looking to brush up on his skills. He said, “I love teaching people about what I know but I'm certain I could become a better teacher, a better trainer. I have had no formal training about training.” Harry and Wayne engaged in a conversation in a set meeting, in which they discussed the training delivery problems they experienced:

Wayne: Over the past two, three weeks, I've been discovering something that I find kind of interesting and kind of perplexing that some of the subjects that I have taught in the classroom and know very well, I've been asked to write down in a manual and that is entirely different and [is] very difficult to explain things in written form and using some illustrations and whatever that you can put on a piece of paper is much harder, I find, than explaining it in [a] classroom. And that kind of surprised me, but that's part of training, too. Sometimes you have to make material that people can lay their hands on.

Harry: I would agree.

Wayne: And this general public, a less sophisticated, if you will, audience. But it's material I'm very familiar with, but it's much more. I'm finding it much more difficult to write it down than to talk about it.

Harry: One of the things that I find difficult about that kind of thing—because I do the same thing not for the general public, but definitely for the people in my company—is writing it from a perspective of teaching someone who doesn't know what I'm writing. I have a habit sometimes of writing it out as if there are certain known factors that the person reading it would already know -

Wayne: Right.

Harry: and I have one thing I struggle with is having to back up and say well, wait a minute, do I need to explain something more to lead to that point to help whoever's reading it know what I'm talking about and not assume that they have the same level of knowledge that I have?

Wayne: Because you don't have a commonly educated audience, if you will.

Harry: Exactly.

Wayne: Yes, yes, I agree, Harry. That's difficult. And as an engineer, I really have to be careful with that because I'm used to talking to and being around engineers all the time. Wait a minute, I'm not writing this for engineers to read.
Job search. After recently changing her career focus, Blair felt her biggest problem was in having had “a very disappointing year as far as getting a job.” Sam similarly searched to find his first role and wanted to get into his first official HRD position. Changing from a long-held career as a website design instructor, ideally, Lee wanted to land a job as an Instructional Designer. He came to the group to receive help with finding avenues for practicing eLearning course development. Lee thought the “logical step . . . would be to find and reach out to a nonprofit and do a project pro bono, just to kind of help improve my skills with.” However, just as Lee experienced at the beginning of his journey, Daria was reluctant to get back into a protracted job search. The problem she brought to the group was initially about ways to stay busy in a job in which she felt overqualified. After the action learning set members asked questions of her, Daria uncovered the real issue she was having at work:

I'm definitely afraid of being unemployed again because that was awful. Just not knowing where your next paycheck is coming from, and trying to sell yourself in a job market that is still very tough. I think that the fear is always there if what happened before happens again.

Problems with managers. Rasheen’s new manager favored an autocratic leadership style. He wrestled with adapting to her “ferocious personality” but at the same time, he admired her strength. “I'm not used to that amount of intensity. This is not like ROTC and I guess historically she's done training for military and police department and stuff. So I think I understand where it comes from.” After talking with the group, Rasheen’s problem became more about how to communicate with her: “I think right now between kind of her and I, really trying to figure out our communication and what that's about.” Rasheen rationalized: “The goal is to kind of flesh out, I think, what exactly it is that she expects from me and kind of boil it down to, maybe the issue is that I don't know what she wants.”
Other problems novices had with managers stemmed from using different approaches. Harry explained that his supervisor's mindset is a little different from his own: “She wants to do it the old way and is set in her ways, and I want to grow and expand and move forward instead of lateral.” He described the power struggle with his manager:

Sometimes there’s a struggle with, okay I understand your opinion, but I choose not to take your advice and I’m going to go in a different direction and I don’t know how that’s perceived sometimes.

Lisa described a past problem where she did not feel supported by her manager by saying, “I get stressed out if my boss does not take my opinion and is not willing to listen or help.” Some of the group members’ managers were accommodating; however, the novices did not take them up on their offers of assistance. Lisa’s current manager was eager to help, but Lisa was unwilling to accept the assistance: “So I did talk to him, but then at the same time I didn’t want to, I guess I didn’t want to feel like I wasn’t adequate.” Similarly, Daria was of the mindset that she could do it on her own: “just being the type of person I am, I also want to try to solve this on my own and bring things to them versus coming to them to try to help me figure out a solution.” Daria acknowledged that she knew managers should help, but she continued to have a problem asking for assistance:

That's really what managers are there for. They’re supposed to be there to help you and work through situations, but I think I know from my perspective, sometimes I use that as a last resort because I don't want them to think that I haven't tried to work it out on my own. I always try to do what I can before I involve them.
Travis echoed her sentiment:

Sometimes I try to work on things on my own before going out and seeking help from management. I kind of want to seem, I guess not autonomous, but like I can handle it on my own

**Finding #2: Novice Meaning Making**

This section provides findings for the second research question, which asked: “How do novices make meaning of their participation in action learning coaching?” This study used an informal and incidental learning lens to inform this view. After reflecting on the participation in action learning coaching sessions, four themes were evident. These themes included learning about self, social learning, learning incidentally, and learning about learning. Table 27 illustrates the themes and subthemes developed after coded data were compiled and analyzed from individual interviews.

**Table 27 Findings from RQ2**

| RQ 2: How do novices make meaning of their participation in action learning coaching? | • Novices learned About Self: Who am I in this Role?  
  o Awareness  
  o Assumption-making  
  • Learned Socially  
  o Learned From Others  
  o Learned Through Others  
  • Learned Incidentally  
  o Technology  
  o From coach  
  • Learned about Learning  
  o Action Learning  
  o Action Learning for Novices |

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Learned About Self

The themes derived from the novices descriptions were of acquiring better knowledge of themselves toward an improved self-concept. Further, novices reported they learned how to identify their own, as well as other’s assumption-making habits.

Awareness. There was a sense that for the novices, action learning provided insight and awareness they did not possess before the experience. Harry said, “I definitely felt like that was a way to stimulate my own train of thought in a way that I might not otherwise have viewed my situation or approached my challenges.” Lee agreed and expressed that “I really thought it was an interesting way to look at problems and issues that I don't think I ever had before.” Travis identified reflection as his key learning outcome:

Before going through this I never took the time to reflect on a problem to try to ask myself different questions. What is it that I feel? Why is it that I feel this way? What is it that I can do to make it better?

Through his case, Rasheen learned about himself, choosing to learn through his case, better ways of communicating with his hyper-vigilant manager. In answering what learning he felt he derived from his problem, he said, “I’m okay that I don't have to be that expert. I don't have to know everything, that I can ask her and kind of let her be the guiding light or whatever.”

Marie reported not only that she learned a great deal from the experience, but she found she was “her own worst enemy in that situation”, and in fact had been constraining herself unduly:

I think one of the biggest things I learned from my case essentially is that I put a lot of pressure on myself which came out while we were discussing the issues that I had with the pressure that I felt from not knowing enough

Harry, who had also been facing pressure in his new role was able to place his personality in context, and gain insight: “us Type A's struggle with always thinking, ‘I know there’s a way to do it’ and then you get too focused on it and you don't step back and see the big picture.”
My suggestion to role play during Lisa’s case came as a surprise to her. Not only did she later admit she thought I put her on the spot, she confessed she was glad I did. Through the exercise, she simulated the process of leading an interview team, and learned through modelling. She felt more prepared after talking to the group and gained confidence. Not only that, but she also had a new appreciation for the process: “I'm more aware of it just because I went through this meeting and I learned about action learning and I was more aware of what I was talking about and how to use it.”

**Assumption making.** Lee, for his part, thought that finding a job as an instructional designer was going to be easy. The problem he presented to the group was initially about brainstorming ways to source non-profit organizations to gain experience. After finding a job in a different field, he realized he conflated the simplicity of his job transition: “I learned that I probably overestimated how I thought the career was in such demand, that it would be something that would be easier to get an opportunity in than it actually was.” At least, he said, it helped him look at the issues from a different angle and a different perspective and remove some preconceived notions. Daria also learned about jumping to conclusions in a job search:

I don't know if I kind of had an idea that I was afraid of trying to move forward, and I think what I learned is that I need to remember that I need to try things rather than focusing on what might happen

Travis was clear in what he learned about assumption making:

What I've learned from that is I made the assumptions and sometimes I'll assume things and of course they're not true. It's just something that's going through my head. When the group said, what they think my assumptions were it was kind of like that aha moment like if they can see that then I should have been able to see that too. . . I guess it took action learning for me to realize that

While communication was a consistent theme for Lisa, the learning she took away was on the importance of being aware but also stretching herself. She said, “actually throughout all of the cases that we went through, I think more about communicating and I think it's the whole
point of action learning, taking the assumptions and analyzing it but not just stopping right there.” Lisa also learned through the experience and changed as a result. She said, “I think I’ve changed very positively. I like this idea a lot, this method of action learning. I guess its common sense—you shouldn’t assume and [you] should look at problems objectively.” Marie quickly used her newly acquired awareness skills:

I think really even just being cognizant of it and being aware of it helped me to take a little bit of the pressure off. So whenever I started feeling like oh, I should know this take a step back, relax, and be like, ‘you're going to learn this in time’.

**Learned Socially**

Another dimension of learning shown in the novice’s reflections was that they learned socially. Some participants were able to see themselves and construct meaning through other’s experiences. For others learning took place peripherally as a witness to other’s experiences.

**Learned through others.** After reflecting on Rasheen’s case, Daria saw herself in his description of his micromanaging boss and saw similarities to how she could have been regarded by her former staff. She said, “I kind of see a little bit of myself in this woman. When I was overseeing a department I'm sure some of my employees thought I was a micromanager.” Daria also saw pieces of herself in her set mates’ unfolding cases: “I saw a little bit of myself in everybody, which was very reassuring to me.” Rasheen learned through Marie’s case, and it helped him with his own:

I do remember Marie's [case], and she was going through a whole thing about professionalism [and] I think I saw a little bit of myself. I think everybody did. But I think that her conversation is going to be helpful when I deal with my supervisor . . . because I think that knowing that you don't necessarily have to be the expert is going to work well with my supervisor personally, because I think my supervisor wants to be the expert at everything. And so I think that being okay that I don't have to be that expert, I don't have to know everything, that I can ask her and kind of let her be the guiding light, I think that's probably the most useful thing I pulled from somebody else's case
Daria similarly learned directly through Lisa’s case:

With her example, it's just reinforced going to your manager and the role play was a really good idea. I got some really good tips. Like with Lisa's case doing the role modeling asking her manager would you mind practicing with me. That was something I'll take away

Rasheen applied learnings from Travis’ case to his own work setting: “at the time of Travis's [case] I remember that in that conversation . . . there were some things that I pulled out and tried to apply within my job.” Wayne learned perspective and benefitted from the collegial atmosphere:

So much of what I heard from other people in the group was helpful because their perspective on things, and how they were using different tools, and what their challenges were with them, and what their victories were, and that's all helpful to me

**Learned from others.** As a whole, Daria expressed satisfaction with the significant learning she picked up from others during the experience:

What I found worthwhile was hearing about everybody's individual cases and then we all had the opportunity to offer what we thought the person was assuming and then hearing their input as to whether or not they agreed . . . everybody was pretty perceptive about picking up on what the real underlying issue was

Travis was not sure he could have learned as much from the experience were it not for a supportive group: “I don't know if I would have had the same results if I didn't have a group of people asking me questions and yelling out what they thought that my assumptions were.” Similarly, Sam felt he learned from other’s cases and thought that he learned by watching action learning play out in Harry’s case. He reflected: “he actually was more competent than he realized. He actually had more tools in his bag of tricks and more confidence, and more capability then he gave himself credit for at the beginning of the conversation.”

Marie found comfort in the group’s commonality. She found it “interesting just hearing people's stories and realizing that a lot of them were similar to mine and that they also didn't necessarily know the technical side of their jobs as well.” Harry similarly benefitted from “just
getting the [perspective] from the different people in different walks of life, [and] seeing how someone else thinks about things.” In the end, learning became the ultimate prize. Lee was happy to learn through others he felt had even more experience than he did.

**Incidental Learning**

Reported learnings from the set members included that which was learned incidentally. These learnings were characterized as either being pleasant surprises, or occurring outside of what they anticipated to learn during meetings. Technology emerged as a subtheme, specifically the use of Adobe Connect. This web-based platform was used in the study to record meetings and provided a synchronous means to conduct sessions. Finally, the action learning coach provided incidental learning experiences for the novices.

**Technology-mediated learning.** When asked what they learned that surprised them Rasheen and Daria quickly responded that they now knew how to use Adobe Connect. Marie expressed that “the fact that we're so far apart from each other, it was nice that we got to utilize the technology for that.” Wayne noticed the methods used to integrate technology into the meetings:

- I definitely enjoyed hearing about technology and being introduced to some new technologies even just using them being on the different calls—I appreciate you doing that by the way—every time you called us you did it a different way, just so we had to use the technology, and that's great

The ability to engage synchronously led to increased social interaction and learning outcomes. Marie thought, “Adobe Connect was good. We could talk, but it's actually seeing everybody's faces. It actually feels like a real conversation.” And Lisa shared a similar belief: “I think seeing people face-to-face web cam, this is very helpful because it creates a closer connection when I'm seeing all the people who are also focusing on what I'm saying. I feel it's
more effective that way.” Marie added, “if we had all just been calling on the phone that would have been a hot mess.”

Perhaps articulating the sentiment in a different way, Travis said it was “nice putting a face with the voice and getting the nonverbal cues that you get from being on a cam. So I think it certainly did help that we could see other people’s faces.” Sam thought body language increased the experience:

I know at least theoretically speaking that the actual words it’s about seven or ten percent of communication and body language and tone make up for the rest of that. So I think it certainly did help that we could see other people's faces

**Learned from action learning coach.** Throughout the meetings, I tried to convey to the participants that I was as much a novice as they. On some level, I figured I was being watched, but never considered how they could learn incidentally through me as a coach. Blair was one who learned through my persistence in setting meeting times: “your tenacity and hanging in there was one thing that I watched you and how you did that, and I thought that was done exceptionally well.” Wayne seemed to view me as one would a teacher:

I was always watching you and learning from how you steered our discussions in a direction that you perceived that they needed to go at that time to help us learn things that we were kind of questioning. You are a master at that. You should be in sales. I think you can make a lot of money

Travis could not visualize the group’s outcomes without a coach: “I don't know if for example, we had a group of people and we didn't have a facilitator, who knows [if we] might have gotten to the same conclusion?” Wayne became one of the biggest proponents of action learning through watching my manner of facilitation:

I've seen the power in action learning. I've seen the power in a very good discussion leader and how important that is to guide the discussion in the right direction so the people discover as they're discussing what you wanted to teach them
Learned About Learning

Reg Revans the progenitor of action learning, said learning-by-doing is an insufficient description of action learning; rather, it is learning to learn by doing with and from others who are also learning-to-learn by doing (Boshyk, 2010). In action learning, small groups of people meet and use questioning insight to explore solutions to real work-based challenges and decide on the action they wish to take. The result can provide group level insight or, as in our case, individual learning for personal development. Below are descriptions and applications of participants learned though action learning and as it related to novice learning.

Action learning. All of the participants made meaning of the experience differently. Sam was nothing if not prolific, and chose to articulate what he learned through the use of metaphors. His first effort was in linking the action learning experience to a Ted Talk he recently heard:

A guy named Sugata Mitra has the idea of putting a computer in the middle of a slum in India and he was going to just leave it there and when people asked him hey, ‘what's this thing doing here?’, he's like, ‘I don't know’ and then he'd walk away. And then he comes back in a couple of months to see how the children progressed and what they've learned. And he was really impressed to see how much progress they had made and how many things they had learned. First of all, it didn't speak English so they had to teach themselves English just to use the computer, and they had done that. Then they had learned a lot of other things using the computer . . . and they were teaching other kids. Sugata also got the idea that when kids got stuck, all they really needed was a mentor to offer encouragement as well as ask questions and . . . by hearing the kids talk and walk through the problem, the kids were usually able to solve the problem on their own just with a little bit of encouragement and some probing questions.

And so it crossed my mind that that was kind of action learning in a nutshell . . . especially if you're dealing with adult learners, they already half know the answer themselves and they just need to be walked through the process and try and help give them an outside perspective to their problem. That may be the biggest issue, that they're too close to the problem and they just needed help seeing their way out of it from an aerial perspective or from another person's perspective . . . and like I said, it reminded me of what Sugata Mitra was saying. And I just wonder how much we're maybe cheating people by giving them the answer that we think is the answer instead of just listening and letting the person walk through their own problem, especially in terms of adult learning.
Sam equated the action learning process to the Wizard of Oz:

It kind of reminds me of the Wizard of Oz at the end where it's like, oh well, you're looking for a heart a brain and courage and you already have all these things. You didn't need to come here in the first place. But you realize that you had it all along

Sam also associated action learning with a GPS:

At the core of action learning, you're including the person who has the problem in the driver's seat and really just helping them be their own GPS, I guess, instead of back seat driving. It's the difference between telling someone what you think their problem is, which doesn't really help empower them or help them feel listened to, [and] using the other approach

Finally, Sam thought the effectiveness of action learning was similar to landing a backflip:

Just like a gymnast when they do a back flip. How do they know they are going to land it? Well, because they have done it enough times and they just know what feels right, and they know how to stick the landing. You can't move somebody's body into the right position and say this is what you should look like when you land. You have to let them fumble their way through it and then they get it. That's what’s made action learning so effective

Lee agreed with Sam’s analysis of action learning helping when people are too close to their problems:

It almost removes you from the closeness that can [happen when] you get too close to something and you don't really see things as they really are . . . it starts uncovering some things that might really be the real reason—the things that really need to be thought about. You may be focused on the answer, but really, you needed to back up here and look at some of the other issues that were part of the problem. The answers sometimes are found much faster if you spend the time dissecting the issues. That's the one thing that stood out in this process.

Wayne thought the experience especially uplifting:

I enjoyed it, and if it helped me discover things that I didn't even know I didn't know, then I should be using it as a learning tool for my students and I think that's the biggest thing you take away from this, is it is a good way to learn and to discover. So yeah, I would say use action learning. Get people as involved as possible in what they're learning.

**Action learning for novices.** Daria reflected on action learning for novices, saying that it forces them to take action to accomplish their goal and correct their problem. She said, “I
knew that you were going to ask me a week later what I had done, and I didn't want to say well I haven't done anything so it forced me to do something.” In contrast to Daria’s approach to action, Sam thought action learning might help other novices who may need more encouragement:

Perhaps what is most effective about this approach is that it's very empowering to a novice . . . novices could say I don't really have anything intelligent to say whereas if it were their turn to present their problem they would be encouraged to participate. Action learning could uncover people who are actually really bright but just need a little bit of help and maybe are slow to speak up.

Sam also learned that action learning was underutilized:

it just crossed my mind how little listening actually goes on and how much the action learning process is untapped . . . it's easy to listen for three to five minutes and then tell the person what you think they should do, rather than spend half an hour and just let the person walk themselves through the problem. And I think the latter is more effective.

By the time of the interviews, Sam had already found it to be effective and thought it would not just work for novices. Sam felt the effectiveness was in the person learning to trust his or her own voice and instincts. “That,” he said, “is at the core of competency—getting to a point where you trust your own instincts.”

Rasheen saw some drawbacks to the action learning coaching approach if participants did not have a baseline of personal awareness, but nonetheless thought it a good tool for novices:

The only issue would be if people say I'm not the person who's in the wrong ever. That it's the supervisors, it's the coworkers and the staff and everybody else that's the issue, it's not me . . . but then I also think that if you do your job really well as the facilitator, you help them to realize that it is them. And so I think that might be the tool for novices—to gain insight about training and about their fears about training and their misconceptions. I think that's a great tool.
Finding #3: Organizational Applications

Research question three questioned: “What systemic changes will novices make in their professional practice as a result of participation in action learning?” This section provides answers to how the set members applied their experiences and learnings to their roles. Personal and professional development arose as themes within the coded data from individual interviews of the novices, as illustrated in Table 28.

Table 28 Findings from RQ3

| RQ 3: What systemic changes will novices make in their professional practice as a result of participation in action learning? | • Personal Development  
  o Empowerment  
  o Mindfulness  
  • Professional Development  
  o Role Play  
  o Professional Techniques  
  o Industry |

Personal Development

Empowerment was a theme that developed from the novices’ reflections on how they applied, or thought they would apply what they learned during the set meetings personally. As well, mindfulness was a technique discussed during the meetings by several members, and subsequently attempted. Mindfulness is a process “of being here now”, attending to the present moment with openness and curiosity (Kabat-Zinn, 1994; Lee, 2009).

Empowerment. There was a pervasive feeling of being empowered to do a better job at work after participating in action learning coaching. Travis, who initially had a poor outlook about his role, was able to gain confidence and self-efficacy:

I wake up in the morning and don't say I'm ready to be back home. It makes things a lot easier. When you draw that type of connection with people that you're working with or training, it makes you feel a little bit more needed, a little bit more important too, because you're connecting with them more than just on a professional level. So, for me, doing this action learning with you, I can take those tools that I've learned here, and I can take that to any problem that I have in any other role in the future.
Rasheen also expressed renewed motivation that was bolstered by his peers in the set:

These seven weeks have been helping me to analyze some of my fears and doubts about training and say, how do I overcome some of those things and be creative again, bring the excitement back to my training? One of the things I am learning about [myself] is the more I can have people in the field who are also dealing with stuff and overcoming their obstacles and trying stuff then it motivates me to stay encouraged and be empowered to make myself better as a trainer.

Lisa was ready to apply what she learned to become better in her HR role:

I definitely think that I will behave differently—I have been behaving differently. I try to incorporate it. I definitely will try to apply it to my job when in the HR world I'm asking you this question. I'm not judging you, I'm just trying to understand your problem and then help you analyze your own problem and then find out what the real problem is.

Mindfulness. Daria introduced the practice of mindfulness into one of the sessions, saying that when she remembered, it helped her stay calm: “mindfulness actually really kind of helps me to focus on something else and then I can go back and approach the problem in a little bit of a calmer manner.” Lisa was interested in the idea, and attempted it at work: “I was stressed and I got up and just breathed. It was hard, but I think it was a good initial step.”

Professional Development

After experiencing a role-play activity, as well as being introduced to mindfulness in set, members wasted little time trying out their new skills in their work environments. This section reflects their learnings and introspection on how they applied the learning to their professional lives.

Role play. Lisa was the recipient of an impromptu role-playing exercise during the presentation of her case. Though initially hesitant, she thought it was really fun:

I did go up to the hiring manager who's responsible for making decisions about the position that we were hiring, and I told him I wanted to learn more about this position. I
kind of put myself as the candidate to kind of see what it is that he was looking for in the
candidate. So I role played with him to see what he was expecting. And so based on
that, I wrote out the questions that I felt like would be necessary to ask during the close
out meeting

When asked how she felt after her try at role-playing, Lisa reflected, “he said that he had
never seen this before, which makes me feel good, because he's learning something from me. It's
not just me learning from him.” Daria was also eager to put the role-playing exercise into her
repertoire:

For me it was just a good reminder that role play with your manager is always a good
idea and that's just not something I had thought of, so I'm going to try to keep in mind
anytime that I have to do something new

Travis, as well, thought the role-play exercise was something to keep in mind:

if you can kind of set up that whole real world scenario and get a little bit of experience,
that always helps and it gets you prepared for the actual situation that you're going to go
through . . . that's something that I'll probably use going forward

Professional techniques. It is important to note that the group was made up of not only
novices, but novice HRD practitioners, trainers, instructional designers, and organization
development consultants. Many of the group members enlisted in the study to learn specific
techniques to apply in their work settings. Travis felt that his demeanor and training improved
due to participation in action learning:

I have noticed that I've been nicer to some of the employees when I do my training. I'm
not so stone-faced or so monotone. My training seems better actually, believe it or not,
because I have my shoulders down. I'm not waiting for somebody to say something out
of the way to me. I'm able to connect with them better on another level because I don't
think that they're all against me
Sam was not sure he was using action learning in his role 100% effectively, but felt the method already helped him in doing a needs analysis for a training project. He started to think about how he could incorporate action learning into more of the training conducted within his company.

Marie and Harry both felt more proactive through action learning. For Marie’s part, she felt that she asked more questions as a result of participation. Harry used what he learned to be more forward thinking at work:

I’ve begun to expand my train of thought when approaching a new task in an effort to identify all of the possible solutions rather than jumping on the first one that comes to mind thinking, that it’s the best option.

In his words, Rasheen “sort of” incorporated action learning into a training session. He said he did what he thought I might, and tried to use the same skills he saw me employ. Rasheen also modeled the role-play technique, saying, “It’s cool to see how you turned action learning into a role play. I'm probably going to use that in my next training this week.”

**Industry.** For the members of the action learning sets, applying what they learned to their profession was a theme that developed. Wayne was happy to apply what he learned about training: “anything I learned about training was new to me and helpful.” Daria was able to understand that a training role might not be a good career path for her. Through the learning process, Marie learned about her profession: “there's an expectation that either you know it before you go in or you learn it quickly because they're not just going to teach it to you.”

Rasheen thought it interesting that the action learning group was not focused on industry specifics, but instead the transfer of ideas. He said, “it was cool that it wasn't so [much about] let me tell you about this industry as much as it . . . could offer insight to people who are brand-new to leadership.” However, Blair was disappointed that she did not learn instructional design
principles, hoping the group would practice on real courses that would build her design acumen. Lee, for his part, discovered that action learning could be applied in many areas: “it is not just in the professional career thing. I think it could be used in so many things.”

This chapter produced findings from participant data in an attempt to answer the study’s three research questions and attend to the study’s main constructs. A full summary of the study is included in the next chapter.
CHAPTER 6

CONCLUSIONS

The purpose of this case study was to consider the use of action learning for the professional learning and personal development of novice human resource development (HRD) practitioners. The study’s guiding questions were: (1) How do novices construct the challenges they face in their new roles? (2) How do these novices make meaning of their participation in action learning coaching? (3) What systemic changes will they make in their professional practice as a result of participation in action learning coaching? This chapter first presents a summary of the study and findings, provides exploration of three conclusions, assumptions, and learning moments that result from the study’s questions, and closes with final reflections.

Study Summary

Data for this case study were culled from an initial survey, virtual, synchronous action learning set meetings, and individual interviews. Using action learning action research (ALAR) methodology, ten participants who were novice human resource development professionals learned from and with each other. The participants convened after answering recruitment information posted on the Association for Talent Development (ATD, formerly ASTD, the American Society of Training and Development) website. ATD was a sponsor of the study, and participants were all new of their field of instructional design, training, and talent development within the past three years. The amount of time for the study spanned a year and a half, with participants making up membership in two non-concurrent cohorts of five members each. In their action learning sets, the cohort members shared personal problems at work, used
questioning insight to help each other discover their own “solutions”, and offered support toward effective actions to take in the workplace. Coaching was used intuitively within sets to fill the needs of case holders. As coach, I prompted conversation, further feedback, and reflections and used activities to spur action within sets, such as role-plays and timely reading material. Cohort 1 could be considered an unsuccessful group, the specter of Bion’s (1961) Basic Assumptions evident in their missed meetings and failure to participate, and in the failure to reach Mink, Mink & Owen’s (1992) first stage. However, this very manifestation helped shape and form the second cohort into a better-conceived action learning group.

There were several aims of the study. The first was to ascertain common problems novices faced as new HRD practitioners. Many of those problems were similar to those faced in any profession, but there were differences seen in what HRD practitioners deal with structurally, as with training delivery and technical knowledge, and in relational skills in dealing with feedback, confidence, and efficacy. Another aim was to provide a vehicle for professional development and enrichment for novices that could not be found with formal training alone. The prevailing sense was that of capacity building through action learning and coaching. A final aim for the study was to assist ATD in identifying programming within the association that could be based on informal learning strategies as opposed to formal learning, and to that end, recommendations were provided in a stakeholder presentation.

Novices’ Construction of Challenges

The first research question asked, “How do novices construct the challenges they face in their new roles?” To answer this question, common problems faced by those new to their roles were compiled from the participant’s own reports of the issues they faced. The problems the novices expressed contained some variance, but were collected into three dominant themes
relating to stress, self-concept, and their jobs. The stress, tension, and anxiety faced by the novices were largely self-inflicted. There were external pressures, for sure, but the most problematic were issues related to the fallout of perfectionism and not wanting to relinquish, or sometimes even acknowledge that they could not do the job alone. Some of the manifestations of their problems in being new were exclusive to being in the field of HRD, while other would be evident regardless of industry. Problems were evidenced in feeling pressure, being overwhelmed, and with setting expectations, both on their own and from others.

**Meaning Making**

How novices made meaning of their roles was germane to the study, and comprised the second research question that asked, “How do novices make meaning of their participation in action learning coaching?” Novices learned who they were in their role, and followed this awareness of self by an cognizance of others. Learning from within and through others was a key finding. An informal and incidental learning lens was used to examine other themes. As a finding, novices learned through technical means, as well as through their action learning coach. Finally, the action learning sets were in and of themselves mechanisms for learning. Novices learned action learning methodology, and more importantly, developed the capacity to apply these learnings to other situations. The ability to learn, reflect, and transfer learning to novel situations was a key outcome of the study and a hallmark of the action learning process.

**Systemic Changes**

Finally, the last question asked, “What systemic changes will novices make in their professional practice as a result of participation in action learning?” This section provided answers to how the set members applied their experiences and what they learned about their roles. Participants reported learning skills they could use in their work and in their lives.
of the skills were tangible, such as the ability to use mindfulness, role-play and facilitation techniques. Other skills were intangible though valuable. Participants came away empowered through action learning, and learned how to be professionals, trading information about being novices in general, and being in HRD, specifically.

In the next section, the findings above are used to draw connections to the study’s conclusions. In this section, two conclusions based on the study’s findings are presented: (1) tacit knowledge acquisition and informal learning occurred despite unconventional action learning processes, and (2) evidence of capacity building through action learning coaching.

**Conclusion #1: Learning Despite Unconventional Action Learning Processes**

This conclusion answers the second research question, which asked, how do novices make meaning of their participation in action learning coaching? There is evidence that tacit knowledge acquisition as well as informal and incidental learning took place despite failures in the action learning process. The context in which the study was described was a factor in the participants’ meaning making and eventual learning. Context is integral to key adult learning theories that have been incorporated into action learning (Marquardt, 2004; Waddill & Marquardt, 2003). How a group begins on the action learning journey is critical to its eventual success. As such, the context in which the action learning process was explained to the members was important, as were their perceptions of and expectations for learning that would take place. In addition, explanations for unsuccessful and ineffective action learning processes provide understanding into what transpired. Finally, some of the most fruitful examples of tacit knowledge acquisition were demonstrated through metaphors used by members to describe their learning. As empirical studies show, the recognition, and deployment of tacit skills could be harnessed to strengthen learning success and outcomes in new workers (Evans, Kersh, &
Kontiainen, 2004). Novices are bolstered by their ability to articulate and share tacit practice knowledge and gain confidence, awareness, outlook on life, and self-efficacy (Hoffman, 2008). Metaphors are one way to express this often elusive practice language.

**Initial Framing of Study**

Early in the study, I presented a dissertation proposal that was heavily focused on developing a community of practice (CoP), which are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly (Wenger, 1998). After the presentation, I began to reconsider the CoP model and instead wanted to offer action learning as an intervention. As I began to formulate ideas about research, create collateral, and recruit study participants, I overlooked an important change to the wording used to discuss the study’s core tenets with the group. In my mind, the change from CoP to action learning was seamless. However, to the participants I conveyed ideas about research that were in keeping with the spirit of a CoP—getting together as a group and talking about problems experienced by novices and finding solutions using technical means. Wicks and Reason (2009) state that the “success or failure of an inquiry venture depends on the conditions that made it possible, which lie much further back in the originating discussions: in the way the topic was broached, and on the early engagement with participants and co-researchers” (pg. 244). Assuming that I could change the study to focus more on action learning than on CoP, I did not revamp the conceptual framework prior to engaging group members. Consequently, the initial framing and my own thinking about the approach to the study never changed. The framing had a significant bearing on how I approached and described the study’s purpose.
Perceptions and Expectations

On how one orients himself to the moment, Henry Miller wrote, depends the failure or fruitfulness of it. Accordingly, the framing of the set’s purpose served to temper the members’ perceptions of the set and expectations of what they would gain from participation. The framing also played a role in the groups’ eventual cohesion problems. In Cohort 1, it became evident that Wayne, Harry, and Blair were much more interested in learning how to find solutions to technical problems than in engaging in learning about the adaptive solutions that were at the heart of the action learning process. Both Wayne and Harry continued to discuss best practices and specifically technical training problems during each set meeting. This was not improper for a group of people who were meeting under the auspices of professional development. However, the practice had the effect of going backwards in development.

A possible reason that members felt the need to continue to discuss technical problems was for affirmation. At no point during the sessions did the participants sounded as though they were ignorant about the subjects they discussed. In fact, the novices were excited and enthused about different ways they enacted training and development. The issues discussed were mainly those related to training delivery:

Wayne: Those are helpful suggestions and at least it helps to know that I'm not the only person that struggles with that. It's harder to write it down than it is to just explain it
Harry: Absolutely

Blair also had different expectations about the purpose of the group. She did not fully immerse herself in the action learning process because she thought the group was going to teach her how to use Instructional Design software. A very telling part in her interview occurred when Blair remembered being in the action learning set in which Harry presented his case. Blair was excited about what he presented, but her recollections about the case did not take account of
Harry’s case, in how he worked with his boss, or how he might temper his expectations as a novice. Instead, Blair wanted to know:

Are they going to use Addie? Are they going to use Sam? Are they going to use iteration between the two of them? And how do you get started? Once we got it kind of fleshed out what the boss expected from this gentleman (Harry), then where does he get started? And that’s the part that I think I really miss. I missed probably some of the best parts where they’re actually talking about getting on Adobe or Articulate or Captivate or whatever their software was going to be. . . I had hoped that we could do theoretical kinds of things [like if] you had the subject and let us all try to get our hands in there and say what's the best way to do this, and what’s the best practice. I was particularly interested in that part

Clearly, Blair expected to learn technical skills within the group settings and was disappointed as a result. For Blair the pretext of joining a group of novices was to learn the nuances of becoming a better Instructional Designer, as opposed to the nuances of being a novice. In many respects, Blair exhibited the classic markings of the Dreyfus and Dreyfus (1980) novice.

Novices in the model are characterized as maintaining rigid adherence to rules, having little situational perception, and having no discretionary judgement (Dreyfus, 1981; Dreyfus & Dreyfus, 1984). In novices, rules are taught through formal education and in books; overreliance occurs even when the rules are found to be less than helpful (Benner, 1984).

Rules are important, but novices also require an understanding of the context in which that information makes sense (Dreyfus & Dreyfus, 2006). Certainly, context is important to provide background for novices. The context in which a learning situation occurs provides the perceptual and cognitive boundaries to help individuals structure and organize their reality (Yeo & Marquardt, 2015). However, in so organizing, novices can often find themselves stuck within their own strict parameters. As described in the literature review, stage models, while offering a limited view of how novices actually progress through the stages, do provide some rationale for the rule-bound novice behavior that was pervasive during the study. For example, Blair fell back
on the previous rules and mental models she set up prior to joining the research study. In studies with nurses, it was noted that novice professionals tend to govern their practice with rule-oriented behavior (Dreyfus & Dreyfus, 1985; Benner, 1982, 1984; Benner & Tanner, 1987) because they have little experience with real situations. In many of these situations, novices can get “unstuck” by being provided with information, which “help[s] the novice set learning priorities and support[s] the novice during the time that they feel overwhelmed and fearful” (Daley, 1999). Coaches in action learning sets can help by situating the novices in supportive environments, so that novices better understand a situation’s context and are able to reflect, observe, conceptualize, and experiment (Peddler, 1997) once they encounter new situations. In other words, novices will be overcome with doubt in difficult situations, but action learning coaching can help assuage that fear.

Stage models offer one view, but the makeup of the group might also have been a factor as to why some of the participants could not break out of preconceived mental models. It is important to note that the present study was grounded in an understanding of the relationship between skill acquisition and knowledge transfer in order to foster competence in the workplace. However, this knowledge fails to acknowledge the relationship between learning and identity (Colley, James, Diment, & Tedder, 2003). The intended makeup of Cohort 1 was to be early career entrants into the field of Human Resource Development (HRD). The actual demographics of Cohort 1, however, were that of career changers who had significant experience in the field, but who were inexperienced in one facet of the field, Instructional Design. A dichotomy existed in my own expectations of ‘novice’, and was evident in the participants having different notions of what it meant to be a novice in the industry. In addition, the gender of the participants may have led to power dynamics and fed the participant’s expectations of learning. Cohort 1
contained four males and one female, and of the males in the group, two worked in male-dominated fields. Harry and Wayne continued to steer the conversations to best practices instead of delving into what could be deemed ‘softer’ methods of inquiry that broached the edges of their comfort zones.

Having an understanding of context helps individuals and groups to increase their capacity for action (Yeo & Nation, 2010). Certainly, the lack of context hindered Cohort 1’s group formation and cohesiveness failed to set the stage for effective learning and group development. Proper context makes people feel secure (Edmondson, 1999) and motivates them to develop meaningful relationships (Raelin, 2000). Cohort 1 members’ disconnection with the group and exhibition of avoidant behavior had much to do with the fact that the initial rules they learned about action learning were predicated on participation in a Community of Practice, but the action learning set were different than their original conceptions.

**Group Level Interaction**

It should be noted that all Cohort 1 members reported learning and were pleased with the changes they were able to make from what they observed of the action learning process. However, serious issues arose that resulted in less than successful action learning processes. This could be explained using Zuber-Skerritt’s (2002) and Marquardt’s (1999) models of unsuccessful action learning action research (ALAR) and ineffective action learning respectively.

According to Zuber-Skerritt (2002), ALAR programs are likely to be unsuccessful if the participants’ basic human needs are not met, and groups fail to learn and develop. In Table 29, examples from both cohorts are used to illustrate how individually and within groups, members of both cohorts exhibited signs of unsuccessful ALAR programs.
Table 29 Unsuccessful AR Programs

<table>
<thead>
<tr>
<th>Unsuccessful ALAR Programs</th>
<th>And they act like this</th>
<th>This Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>If they perceive:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project is too difficult for them to bring to a successful completion, or if they feel inadequate</td>
<td>Blair did not want to present a case</td>
<td>no self-worth/success</td>
</tr>
<tr>
<td>Additional work and collaboration is too demanding, time consuming, strenuous and to be avoided</td>
<td>The group began to miss scheduled appointment times despite confirmation</td>
<td>no fun/ enjoyment</td>
</tr>
<tr>
<td>The action learning sessions are unstructured</td>
<td>Unwillingsness as a group to present ALAR project</td>
<td>learning could be transitory, unnoticed, unappreciated and unrewarded</td>
</tr>
</tbody>
</table>

Adapted from (Zuber-Skerritt, 2002)

**Uncomfortable Presenting a Case.** ALAR may make participants feel inadequate, which in turn may lead to unsuccessful outcomes (Zuber-Skerritt, 2002). Blair did not want to present a case when approached. She said she did not have a job and felt bad about not being able to join in the sessions. When it was mentioned that she could still participate using her job as a problem, she continued to decline the offer. Blair said, “I didn’t feel like I had a lot to offer because I didn’t have a project. I was hoping that I would be gainfully employed by that point and was not, so that was a surprise.”

**Missed Appointment Times.** Cohort 1’s missed appointment times were a result of lack of time as well as an erratic scheduling system. If the date and time had been regulated, it is possible the group would have met the requirements of the set and joined as scheduled. In fact, in the second cohort, members were equally as busy, but found the time to participate with only a few missed occurrences, due to the expectations that were built into the study.
Public Presentations. Despite urging that each group make presentations about what they learned and hearing about one suggestion from a group member to make an eLearning course out of the experience, no one for either cohort elected to do so. Their learning may have been curtailed as a result. As Zuber-Skerritt, (2002) relates, participants should make the effort to commit their thoughts and findings to writing and public scrutiny, so that action learning then becomes action research. By not making a public presentation, neither set completed the ALAR cycle.

Ineffective Action Learning

I am not advocating that Cohort 1 produced wholly ineffective action learning while Cohort 2 exhibited only superior qualities. In fact, even in highly functioning action learning sets some aspects could be ineffective, as was seen in both cohorts. Table 30 shows an adaptation of Marquardt’s (1999) warning of occasions where learning is ineffective for problem solving and organizational learning.

<table>
<thead>
<tr>
<th>Seven Factors of Ineffective Action Learning</th>
<th>Factors Manifested in Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Inappropriate choice of project.</td>
<td>Rasheen’s case concerning his micromanaging boss</td>
</tr>
<tr>
<td>(2) Lack of support from top management.</td>
<td>Not exhibited</td>
</tr>
<tr>
<td>(3) Lack of time.</td>
<td>One hour allotment of time for each session was not enough to properly attend to cases</td>
</tr>
<tr>
<td>(4) Poor mix of participants.</td>
<td>Continual addition of participants to cohort 1 led to group formation failures</td>
</tr>
<tr>
<td>(5) Lack of commitment by participants.</td>
<td>Failure to attend meetings and inconsistent participation from group members</td>
</tr>
<tr>
<td>(6) All action and no learning.</td>
<td>Group continued to discuss actions and best practices in training delivery</td>
</tr>
</tbody>
</table>
Inappropriate choice of project. Rasheen chose a case that was perhaps not as robust as it could have been. In his first mention of the case, he admitted that his interactions with his boss were problematic in the past, but currently were less so. As a result, the set could not fully help him with the identification of underlying issues as Rasheen was already trying new ways to communicate with his boss, and had seemingly “solved” this issue. According to Marquardt & Revans (1999), unimportant problems can diminish creativity, commitment, and learning.

Lack of time. In this respect, I did not allot enough time to properly conduct an action learning set. As would happen in both cohorts, the one-hour time allowance necessitated the case holder having to curtail their presentation. During my session where my advisor Dr. Watkins facilitated, she mentioned time as a problem in getting into a rhythm.

Karen: . . . there’s no time, Angie!

Angie: Yeah, I know. That what I’m feeling too.

Karen: I sort of feel if we could relax and get into this a little slower, we’d probably do a little better . . . It’s hard to be in question mode when you have 10 minutes!

The allocation of an hour to delve deeply into a case along with a full agenda that contained reflections was limiting, and thus became a reason for ineffective action learning.

Poor mix of participants. There was a poor mix of participants in both cohorts due to the constant adding of participants. When it became clear almost from Cohort 1’s inception that members were not showing up to the scheduled appointments, I became concerned that I would not have enough members, so I continued to recruit. Each time a new member joined, I
explained the process, and the group had to go about forming all over again. I also added Daria into Cohort 2 after the first week of sessions had transpired. Luckily, Daria assimilated into the group well and there were no ill effects to the group dynamics. These additions, particularly in Cohort 1, combined to create an ineffective action learning situation.

**Lack of commitment by participants.** A lack of commitment was pervasive in Cohort 1, seen in not showing up to scheduled meetings, and failing to answer correspondence in a timely manner. As a result, some of the sessions were curtailed and the entire cohort had to be shut down because of lack of participation. In Cohort 2, personal issues prevented two of the members from joining the last session, which led to disappointment from the remaining members, but was seen as nothing more than competing commitments.

**All action and no learning.** Cohort 1 showed a propensity toward taking action, or at least discussing action as opposed to reflection after action. Their penchant for describing training events and best practices seemed to affirm each other instead of generating ideas each could take away and transfer to practice.

**Novice set advisor.** From the beginning of the study, I have been keenly aware of my own inexperience. Not only did I not know the process of action learning, but also I attempted to learn using videos and research beforehand. Because I did not know how an actual set should be run, I continued to do the same things even in the face of inefficiency, such as continuing to send out polls to get consensus on dates and times. I reasoned that sending polls would work at some point, but it became a source of frustration for Sam saw through the ineffectiveness and called me on it. At one point, Dr. Watkins noted, “it seems that you kept trying the same things over and over even though they were not working.” I had to get over my feelings of failure and concentrate on the value the of the learning I experienced.
Metaphors as Conformation of Tacit Knowledge Acquisition

The metaphors of one action learner provide opportunity for an examination of tacit learning in the action learning coaching sets. Sam’s interview and ruminations post set allowed for a closer look at how action learners might process the experience and expressed tacit information. This closer look at metaphors is based on the ideal that metaphors not only afford different ways of perceiving the world (Ortony, 1993), but they reveal an individual’s beliefs, values, and assumptions (Schein, 1991).

Sam was prolific in his use of metaphors to describe his learning. In his interview, he was appreciative of the experience and lamented not being able to share with a wider audience:

I just wonder how much we're maybe cheating people by giving them the answer that we think is the answer instead of just listening and letting the person walk through their own problem especially in terms of adult learning

Sam’s penchant for metaphor helped him in “understanding and experiencing one kind of thing in terms of another” (Lakoff & Johnson (1980, pg. 5), as exhibited in Table 31.

### Table 31 Sam’s Metaphors

<table>
<thead>
<tr>
<th>Sam’s Metaphors of the Action Learning Experience</th>
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<tbody>
<tr>
<td><strong>Wizard of Oz</strong></td>
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<tr>
<td>“It kind of reminds me of the Wizard of Oz at the end where it's like, oh well, you're looking for a heart a brain and courage and you already have all these things. You didn't need to come here in the first place. But you realize that you had it all along.”</td>
</tr>
<tr>
<td><strong>Ted Talk: Sugata Mitra</strong></td>
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<tr>
<td>“It reminded me of a Ted Talk that I watched recently by a guy named Sugata Mitra and he was talking about building a school in the cloud. He basically has the idea of putting a computer in the middle of a slum in India and his pedagogical approach was basically that he was going to just leave it there and when people asked him hey, what's this thing doing here, he's like I don't know and then he'd walk away. And then he comes back in a couple of months to see how the children progressed and what they've learned. And he was really impressed to see how much progress they had made and how many things they had learned. First of all, it didn't speak English so they had to teach themselves English just to use the computer, and they had done that. And then they had learned a lot of other things using the computer. But basically they were teaching other kids and the guy, Sugata, he also got the idea that when kids got stuck, all they really...”</td>
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</table>
Sam’s Metaphors of the Action Learning Experience

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<tbody>
<tr>
<td><strong>Action Learning as a GPS</strong></td>
<td>“At the core of action learning, you're including the person who has the problem in the driver's seat and really just helping them be their own GPS, I guess, instead of back seat driving. It's the difference between telling someone what you think their problem is, which doesn't really help empower them or help them feel listened to, [and] using the other approach.”</td>
</tr>
<tr>
<td><strong>Action Learning as a Backflip</strong></td>
<td>“You can't move somebody's body into the right position and say this is what you should look like when you land. You have to let them fumble their way through it and then they get it. That's what’s made action learning so effective”</td>
</tr>
<tr>
<td><strong>Action Learning as Therapy</strong></td>
<td>“It reminded me of a like what you would do in a psychoanalytic practice or a therapy session where you'd be a sounding board rather than telling the person what they ought to do and you help the person find their own way through the problem.”</td>
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</tbody>
</table>

Sam used metaphors to name his experience, making his tacit understanding of action learning explicit. In this case, Sam’s use of metaphors explained what he previously learned in a way that facilitated the ‘telling’ of sufficient information to convey the knowledge being discussed (Eraut, 2000). Sam used metaphorical language because his tacit knowledge had no voice (Munby, 1986) and metaphors allowed him to communicate meaning when there was no explicit language available in the face of a complex ambiguous experience (Srivastava and Barrett, 1988). Through the use of metaphor Sam was able to say what could not be said in discrete, literal terms, as words for his experience in action learning were unavailable and inaccessible (Srivastava and Barrett, 1988, pg. 37).

Despite Sam’s frustration with the cohort’s commitment issues, he was able to articulate tacit knowledge gained from participation. For him, metaphors became the means for tacit
knowledge articulation and captured a continuous flow of experience (Ambrosini & Bowman, 2001), which is reminiscent of Dewey’s (1933) reflective deliberation in which an attempt is made to make sense of and evaluate experience. Sam’s experience was similar to the outcomes of Hoffman’s (2008) study, which looked at the participant’s degree of unawareness about their development of skills, competencies, and knowledge. The study explored not only the participants’ self-perception, but also their experiences and value placed on the development of tacit knowledge, tacit skills, and competencies. Whereas Hoffman’s (2008) study used concept mapping to identify, capture and make explicit tacit knowledge, this study utilized action learning with similar results. Sam’s awareness of the need to make meaning of his experience confirms that tacit knowledge elicitation and informal learning took place, provoking durable changes (Hilgard & Bower, 1966).

**Conclusion #2: Capacity Building Through Action Learning Coaching**

This conclusion answers the first and third research questions. The first asked, how do novice HRD practitioners construct the challenges they face in their new roles? The second question asked, what systemic changes would they make in their professional practice as a result of participation in action learning coaching? The novices’ construction of challenges allowed them to build capacity through the experience. Capacity building is a process that improves the ability of a person, group, organization, or system to meet its objectives or to perform better (Brown, LaFond & Macintyre, 2001). In fortifying individuals for the future, capacity building involves making individuals the best forms of who they are so that they might develop personal mastery, contribute their gifts, and find balance in their lives (Reinelt, 2006). Marsick (2003) advocates action learning as a means to stretch individuals farther than they could reach themselves through deep questioning, assumption identification, and problem reframing that
results in increased individual abilities for enhanced informal learning and metacognitive skill development. According to Sheckley and Keeton (1999), individuals develop proficiency by working in challenging and supportive environments, self-monitoring, engaging in deliberate practice, and solving ill-defined problems.

As a process, action learning was shown to assuage feelings of confusion and doubt that the novice experiences, and further help them deal with rapidly changing environments, build internal capacity to face new challenges and develop skills including the ability to think outside of the box, cross boundaries, integrate perspectives, and experiment with feedback (O’Neil & Marsick, 2014). A conclusion drawn about the novices in the study is that their capacity to meet new challenges has grown. Some examples of this are in Lisa’s newfound ability to engage in role play and in Rasheen and Travis’ admissions that they are now better at their jobs through action learning.

**Internalizing Role Play**

Lisa reported that she performed an impromptu role play with her boss. The following exchange showed Lisa’s internalization of the process:

Lisa: I did go up to the hiring manager who's responsible for making decisions on the position that we were hiring for. And I told him I wanted to learn more about this position and I kind of put myself as the candidate to see what he was looking for in the candidate. So I role played with him to see what he was expecting. And based on that, I wrote out the questions that I feel like would be necessary to ask during the closing out meeting.

Angie: How did that feel when you did the role play?

Lisa: It felt good. He thought it was very interesting. He said that he never seen this before, which is I think it makes me feel good because he's learning something from me. It's not just me learning from him.

Given Lisa’s original construction of her problem, initial nervousness about speaking in front of others because of her accent, and general inexperience in facilitation skills, the ability to
role-play allowed her to practice skills in a safe environment so that she could come away with new knowledge to use in novel situations. Even as she employed the skills learned action learning that were bolstered through coaching, the onus was on Lisa to transfer these newfound skills to practice. Participation in action learning, and in particular her role play of a real situation at work left Lisa better prepared and more confident than before.

The outcomes of this conclusion support theory drawn from the larger body of action learning research literature, specifically from within leadership development programs that employ action learning methodology. In these programs, relatively inexperienced participants are elevated through the participation. In Stark’s study (2006) acceptance and the ability to cope with change was carried into workplaces. The incidental learning derived from participation in was a key finding in the study. Similar to Lisa’s experience, Cowan’s (2013) use of action learning in a leadership development study established that action learning enabled incidental learning and allowed for the development of confidence, self-efficacy, and professionalism. Both of these studies show that action learning is aspirational in its ability to elevate participant’s skills and self-concept.

**Getting Better In Performing Roles**

Both Travis and Rasheen got better at their jobs through the use of action learning. As for Rasheen, action learning was a motivating factor:

I think it was refreshing to get the insight that they've also had experience with micromanagers And I think that for me it was just more of refreshing motivation to keep getting better at how I communicate and what I'm communicating.

For Travis, action learning enabled his becoming a better trainer through the experience:

One time sticks out in my mind since I presented my case, where I went into a situation with training and I thought that I was going to get ambushed by a couple of people . . .
I have started going into situations and being a little bit more open and not having my guard up all the time, because it's not always about me. The situation can have more aspects and more dimensions, and there can be outside and other contributing factors as well, so picked that up.

Linking to Hoffman’s (2008) empirical study mentioned previously, we once again see that the process of unravelling tacit experiences opens up future pathways of learning. Travis and Rasheen both exhibited tacit knowledge articulation and informal learning that built future capacity. Tacit knowledge and awareness are integral to personal growth in that they support a transformation of the individual, a learning process that involves becoming more aware. This process includes the awareness of (a) the forces shaping one's life (political, social, economic etc.), and (b) one's ability to restructure one's attitude, actions, and possibly one's world. In addition, one's belief system about 'self' and society is being restructured (Freire, 1970; Mezirow, 1991; Boyd & Myers, 1988, as cited by Hoffman, 2008).

Members gained knowledge through action learning, triggered by conscious reflection (Gee, 1990) and reflection in and on practice (Schön, 1983). Reflection revealed nuances and differences in perspectives that were not previously visible, and consequently raised self-awareness and spurred further learning (Marsick, 1990). Each member left the action learning set better equipped to deal with the future, and more willing to engage in ambiguous situations. Finally, capacity was built through empowerment and practice in areas they could then apply to their roles and in the future.

**Conclusion #3: Action Learning Coaching, a Chimeric Construction**

In Greek mythology, the chimera was a composite of different animals: part lion, part snake, and part goat that breathed fire (Saniotis, 2007). This conclusion puts forth the view that action learning coaching is a distinct practice, much like the chimera of ancient Greek lore that
combined the best of what made each animal great to create a new creature. Informing this assertion is literature used to evidence its joint use.

Action learning coaching is a combination of many different knowledge bases. Included here are influences from action research, action learning, business coaching, informal and incidental learning, and knowledge creation (as shown in Table 32).

<table>
<thead>
<tr>
<th>Borrowing from the following established tradition</th>
<th>Action Learning Coaching:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Research</td>
<td>Encourages creativity (Zuber-Skerritt, 2002)</td>
</tr>
<tr>
<td>Action Learning</td>
<td>Helps individuals more easily cope with change that occurs in their lives (Stark, 2006)</td>
</tr>
<tr>
<td></td>
<td>Develops proficiency by working in challenging and supportive environments, self-monitoring, engaging in deliberate practice, and solving ill-defined and ‘wicked’ problems (Scheckley &amp; Keeton, 1999; Sankaran &amp; Brown, 2012)</td>
</tr>
<tr>
<td></td>
<td>Creates the environment and opportunity for learning through action (Vaartjes, 2005)</td>
</tr>
<tr>
<td>Business Coaching</td>
<td>Unlocks a person’s potential to maximize their own performance, and helps them to learn rather than teaching them (Whitmore, 2003)</td>
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<tr>
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<td>Provides a safe place to experiment</td>
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<td>Informal/Incidental Learning</td>
<td>Grows out of everyday encounters (Marsick &amp; Watkins, 2001) is flexible, highly adaptable, and allows for the rapid transfer to practice and resolution of work-related problems (Dale &amp; Bell, 1999).</td>
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<td>Curates individual capacity to optimize creative problem solving, development and learning (Brown, 2011).</td>
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<td>Allows for learning and development of confidence, self-efficacy, and professional acumen (Cowan, 2013)</td>
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<tr>
<td>Knowledge Creation</td>
<td>Provides a medium to transfer and apply knowledge from other contexts into their workplaces (Abbott, 2006)</td>
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<td>Gaining of confidence, awareness, outlook on life, and self-efficacy through the articulation of tacit practice knowledge (Hoffman, 2008)</td>
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As a practice in its own right, action learning coaching borrows first from action research programs, where creativity is one of the core values. People engaging in action research should be willing to ‘take risks, to be flexible and innovative, and to encourage others to be likewise’ (Zuber-Skerritt (2002), p.149). Creativity is necessary in order to design and develop programming that meets participant’s emergent needs. Next, action learning coaching takes cues from the established tradition of action learning that has as an outcome the ability to deal with the inevitable change that occurs in life (Stark, 2006). Within action learning is also the premise that proficiency is developed by working in challenging and supportive environments, self-monitoring, engaging in deliberate practice (Sheckley & Keeton, 1999). Much learning takes place through problems that are ill-defined and ‘wicked’ (Sankaran & Brown, 2012), and solving such problems provides for meaningful learning opportunities. Finally, setting the stage for learning is an important part of action learning coaching. It is important to retain the idea of learning through action (Vaartjes, 2005) that is inherent in action learning programs.

Business coaching has been an integral part of the study, and is included here because of its latent ability to unlock potential, and maximize individuals’ performance. An important feature to borrow from this tradition is that coaching helps participants to learn rather than teaching them (Whitmore, 2003). Equipping participants with the tools to become better employees and individuals is more important than providing information in a one-off workshop. Analogous to this is the idea that coaching provides a safe place to experiment. Role-play, as enacted in the study by Lisa is evidence that the action learning coaching experience provided opportunity for incremental learning and practice.

Informal and incidental learning as defined by Marsick and Watkins (2001), grows out of everyday encounters, is flexible, and highly adaptable. In contrast to occasions of formal
learning, informal learning has the advantage of rapid transfer to practice and resolution of work-related problems (Dale & Bell, 1999). Not only that, but informal learning is aspirational and curates individual capacity to optimize creative problem solving, development and learning (Brown, 2011). Without sometimes even acknowledging that it is occurring, individuals who have learned informally and incidentally are aided through the development of confidence, self-efficacy, and professional acumen (Cowan, 2013). Knowledge creation, too, is vital to action learning coaching. First, whether the knowledge is tacit or explicit, there must be a mechanism to transfer and apply knowledge from other contexts into the novice HRD practitioners’ workplaces (Abbott, 2006). Through its articulation, there is a way to gain confidence, awareness, outlook on life, and self-efficacy by sharing practice knowledge (Hoffman, 2008).

Certainly, much more study is required before for action learning coaching can be viewed as its own practice, separate and distinctive from action learning or coaching. Nevertheless, the time is ripe to explore the conceivable permutations of action learning as integrated with coaching, specifically as a means to develop future individual capacity.

**Learning Moment #1: Reign of Error**

“The self-fulfilling prophecy is, in the beginning, a false definition of the situation evoking a new behavior, which makes the originally false conception come true. The specious validity of the self-fulfilling prophecy perpetuates a reign of error. For the prophet will cite the actual course of events as proof that he was right from the very beginning.”

—Robert K. Merton (1948)

Confronting me throughout the study were my fears about being a novice researcher and action learning coach. Those fears eventually worked their way into the research. I was afraid of having a failed group and what I deemed would become incomplete research. Early on in my classes, I internalized the stories we heard of other researcher’s failed action research studies, and I vowed that mine would be successful. Having to start over with another sponsor or new
action research team seemed to be the stuff of nightmares. Thinking back, I was so very focused on “getting it right” that on several occasions I missed out the opportunity to learn and reflect and experience the research. I could have redirected Cohort 1, for example or more fully involved the sponsor. Despite my best efforts, the group still failed, and I am ecstatic that it happened. That the first group ended prematurely was one of the best learning moments I have ever experienced. Besides, Cohort 2 benefitted from this learning. Although I could look at their eventual success as redemption, I prefer to say that I won my battle with ambiguity. Certainly, learning can occur through any situation: what I initially deemed as a failure was actually cause for celebration in the learning that ensued.

**Learning Moment #2: Ubiquitous, Necessary and Invisible**

“Technology should be like oxygen: ubiquitous, necessary and invisible.”

—Chris Lehman (2010)

At the beginning of the study, I reasoned that the use of Adobe Connect would be beneficial for the participants, as the value of merging collaboration and community in e-learning, lies in the intellectual and human benefits of collaborative activity (Haythornthwaite & Andrews, 2011). The findings indicated that its use was helpful inasmuch as it enabled real time audio and visual, and that it approximated face-to-face conversation. Even with the technological glitches that made some of the sessions difficult, the ability to see each other made the use of Adobe Connect useful for the facilitation of virtual action learning, and perhaps even necessary. Interestingly enough, given that HRD practitioners have a high probability of using similar virtual tools in their workplaces, the use of the virtual platform became invisible, in essence becoming a tacit tool for the participants. The use of Adobe Connect became as invisible as a face-to-face interaction, and was so embedded, fitting, and natural, that we use[d] it without even thinking about it (Weiser, 1991).
Learning Moment #3: A Hidden Rorschach Test

“It has been said that all writing is autobiographical. If true, then one’s research because it is such an intense and focused form of writing must be a particularly intimate form of autobiography. In this sense, all scholarship is self-revelatory. It is as if there is embedded, within the body of one’s published work, a hidden Rorschach test that reveals more than even the author sometimes knows.”

—Jay Barney (2005)

Through this Action Research study, my original goal was not only to improve practice in functional terms, but also to understand how my work was shaped by ways of seeing and understanding myself in context (Kemmis, 2001). Ultimately, I wanted to grasp how I learned through my own personal experience as a novice HRD professional, and how others might benefit from changing, growing, and learning. Now, after reflecting on the research, I have a few revelations about myself that I did not have at the outset.

First, I have a different understanding of my role as an action learning coach, and indeed, as a leader. My role is not so much to provide information and advice to others who then apply knowledge to their practice. Rather, it is to help them to create this knowledge themselves through experience, making meaning through self-reflection, assumption holding, and critical debate with others (Zuber-Skerritt, 2011). The more I focus on others, the more learning results for everyone involved. I used to think that teaching and leading was about imparting knowledge on others, but now I know it is about guiding and facilitating learning. It is more about them, and much less about me.

I now understand more fully the need for questioning and probing. Goldberg (1998) said, “Questions are like treasures hidden in broad daylight” (p. 6). I now more fully appreciate that there is power in asking, and skillfulness in interpreting the interaction. Indeed, asking questions and inquiring of others has not only sharpened my listening skills, but has also heightened my
sense of self and increased my acceptance of ambiguity. I am more often engaged and present, and enjoy the feeling of being in the moment.

My last self-revelation is really about understanding that my effectiveness in learning, listening, reflecting, and leading is determined by me. My own self-awareness is key to my journey as a leader and as a person. In the workplace, and in life, being a novice will be a continual process. I might be a novice at one thing and expert in another during countless situations going forward. Being new to anything is difficult and takes time, patience, and self-care. Sometimes just this knowledge is enough.

**Providing for the Shoemaker’s Children**

Watkins (1990) likened HRD practitioners to the shoeless shoemaker's children, and found a paradox in those who provide learning for others that overlook learning for themselves. Consequently, HRD practitioners may find their long-term competence jeopardized, their capacity non self-renewing and no way to reach higher levels of competence. The stakes have never been higher for the HRD practitioner, and the development of future capacity an imperative. This study identified action learning coaching as a means to facilitate capacity building for novices. Not only did participation in the study produce learning and self-awareness for the novice participants, but it also promoted confidence and self-efficacy. Novice professionals shared insights on common workplace problems they experienced in their new roles, and employed action learning coaching methodology to elicit tacit knowledge and informal and incidental learning, which resulted in greater capacity to face future challenges.

The analyses presented in this dissertation highlight the tension between a workplace that desperately requires the skills possessed by human resource development practitioners, and an
industry that fails to develop its own adequately. The future is now for Watkins & Marsick (2009):

These then are the emerging tasks of those who would facilitate learning in the workplace of the future. They will be multilingual, operating across culture and languages, and facile in multiple pedagogies. As always in the intensely interpersonal and interactive world of human resource developers, they themselves remain the primary tool—their capacity to learn their life long: to model and coach others in living and working in in a multilingual, multicultural, multimedia context—will determine their effectiveness (pg. 136).

Human resource developers and the HRD profession could benefit in numerous ways from recognizing that formal learning should not be the only means of workplace learning and development, especially on behalf of their own practitioners. The premise of the study was that novices and specifically those involved in developing others required a different approach. An instructor-led ATD workshop for new career entrants that was chock-full of models, theory, and information laid bare the need for a nuanced way to develop novices and build capacity for future problems and roles.

It was also my own frustration, lack of network and poor assimilation after changing careers to HRD, which catalyzed my interest in this study. As a novice action learning coach, I learned alongside the participants, although the process of learning in situ became arduous and nearly impossible. In the end to watch participants became aware of their own understanding and to witness the reach of the study extend past the participants workplaces to their lives, was personally fulfilling. The study stretched me as a budding scholar-practitioner, and whet my appetite for additional opportunities in action learning and leadership.
I am also taking up the mantle to champion the novice, who is wholly underrepresented in scholarly circles. Further research is needed to explore how, and to what extent, practice is enhanced by the articulation of tacit knowledge, and specifically how this articulation is enacted by novice workers. Finally, not nearly enough is known about novices in action learning. Literature supports action learning and coaching within leadership development circle and for high-potential employees, but as this study has shown, novice workers find utility in the method.


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APPENDIX A:

Action Research Consent Form

Dear Novice Workplace Learning Professional:

I am a graduate student under the direction of Dr. Karen Watkins in the Department of Lifelong Education, Administration and Policy at The University of Georgia. I invite you to participate in a research study entitled ‘Action Learning for Professional Practice: How the Novice Workplace Learning Professional Develops Competency’ that is being conducted with the consent of the ASTD Middle Tennessee Chapter. The purpose of the study is to explore the challenges faced by novice workplace educators within their new roles in order to determine what support enhances their development.

Participation In Research
Your participation will consist of approximately 10 web-based, face-to-face and email interactions that last no more than an hour in duration. In addition, you will do a pre- and post-survey outside of the meeting time, as well as follow up interviews, which should take no more than 45-minutes each to compete.

Your involvement in the study is voluntary, and you may choose not to participate or to stop at any time without penalty or loss of benefits to which you are otherwise entitled. If you decide to stop or withdraw from the study, the information/data collected from or about you up to the point of your withdrawal will be kept as part of the study and may continue to be analyzed. You will receive a webcam and headset to facilitate our online discussion through Adobe Connect. You may keep the webcam and headset to use as desired.

Published Results and Benefits
The results of the research study may be published, and your name and identifying information may be used. The findings from this project may provide information on the manner in which novice workplace educators develop competency within an action learning set. As well, the potential benefits to your belonging to an Action Learning set can have long term implications in your confidence levels as a novice as well as your competency in the field. There are no known risks or discomforts associated with this research.

Audio/Video Recording
Audio and/or video recording will be used in the course of the study, in meetings, and beyond, such as in publications and presentations. These are needed to capture the thoughts and ideas you have about your new role and will be kept indefinitely upon completion of the research.
If you decide to participate in this study, your participation in AR team meetings and activities will be audio and video recorded and used as research for my dissertation.

**If You Have Questions**
The main researcher conducting this study is Dr. Karen Watkins, a professor at the University of Georgia. Please feel free to ask any questions you have now. If you have questions later, you may contact Dr. Watkins at kwatkins@uga.edu, call me, Angie Carter at (615) 995-8428 or e-mail me at adc256@uga.edu. Questions or concerns about your rights as a research participant should be directed to The Chairperson, University of Georgia Institutional Review Board, 629 Boyd GSRC, Athens, Georgia 30602; telephone (706) 542-3199; email address irb@uga.edu.

To voluntarily agree to take part in this study, you must sign on the line below. Your signature below indicates that you have read or had read to you this entire consent form, and have had all of your questions answered.

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Please sign both copies, keep one and return one to the researcher.

Please also complete and return the questionnaires in the envelope provided, and thank you so much for agreeing to participate in the above described research project.

I look forward to our journey together.

Sincerely,

Angie Carter
APPENDIX B:

Interview Protocol

BACKGROUND

As you know, the life of a novice can be rather complex. You are learning how to learn, all the while navigating a new field. On top of that, you have to know when and how to apply that knowledge as you become more competent. Action learning coaching is a method that we used during our meetings as a way to learn through, and reflect on, the problems you face as a novice in the workplace. I am interested in what you learned through the process, how you might have brought what you learned into your role, and how similar groups for novices should be structured. I would like to ask you some questions about your experiences, about how you made meaning from those experiences, and finally, what kinds of learning outcomes you had.

Shall we begin?

QUESTION ONE

Prompt: Think about a time during the action learning set meetings when you learned something through a problem or situation that YOU introduced. I would like to know what you learned as a result of your case.

Probing Questions: What happened? Did you make any personal changes? Did you apply it to your work setting?

QUESTION TWO

Prompt: Think about a time during the action learning set meetings when you learned something through a problem or situation that someone else introduced. I would like to know what you learned as a result of hearing someone else’s case.

Probing Questions: What did you learn as a result of their case? What happened? Did you make any personal changes? Did you apply it to your work setting?

QUESTION THREE

Prompt: Think about a time during the action learning set meetings when you learned something that was OUTSIDE of the problems or situations that were introduced.

Probing Questions: What did you learn? Was it a tidbit, a technique, or new technology? What about the design of the meetings? What about the facilitator? Action learning itself? Did you apply any of this to your work setting?

QUESTION FOUR

Prompt: Overall, tell me about your experience in the action learning event.
**Probing Questions:** What did you learn? What are some unexpected things you have learned? Were you surprised by anything?

**QUESTION FIVE**

**Prompt:** How have you changed, either positively or negatively, from this experience?

**Probing Questions:** Are you behaving differently? Can you perform different skills? What are they?

**QUESTION SIX:**

**Prompt:** What have you learned about the industry, if anything?

**Probing Question:** Why?

**QUESTION SEVEN**

**Prompt:** What is your perception, if any, on how this action learning program will allow you to take what you have learned back to your job?

**Probing Questions:** Describe how the action learning experience helped you feel less confused about your role? What behaviors are you exhibiting that are different? What skills have you learned?

**QUESTION EIGHT**

**Prompt:** What aspects of this action learning experience contributed to your learning?

**Probing Questions:** Was it the design of the program? The other members? The organizational context? Did technology aid or hinder the learning in the set? What did you think about not being able to give advice?

**QUESTION NINE**

**Prompt:** What is your opinion on action learning as a method for developing novices?

**Probing Questions:** Why do you believe this? What are examples of how action learning can or cannot be used to develop novices? How can professional groups use action learning coaching for novices?

**FINAL QUESTION**

In light of what you have now talked about, is there anything else you would like to tell me (or you think that I should know) about any other particularly significant learning you experienced during this time?

**WRAP-UP**

At this time, I can answer any questions you might have. I would like to thank you for agreeing to participate, and please do not hesitate to contact me should you have any additional questions.