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The What-How Imbalance
What I've Learned about Learning in Companies: A Reminder and Call to Action

By Barbara Perry

In 1992, I wrote an article for the *OD Practitioner*, "Lenses for Learning." It described three "invisible forces" that hampered organizational learning:

1. **The Hero Culture**. Thanks to a mighty investment in teamwork combined with the necessity for collaboration this one is largely irrelevant. Except we still have the bell curve.
2. **Impatience**. Improved, as evidenced by greater willingness to explore at the front end of innovation and more willingness to reflect collaboratively. There is still much room for improvement.
3. **Outcome Orientation**. The Big Kahuna. Then and now. In 1992, I wrote: “Our obsession with outcomes and goals over process is, more than anything else, what gets in the way of our ability to learn. We are single-mindedly preoccupied with success or failure in a world where results are what counts, not the journey. We value the What, not the How." (p. 3)

As a cultural anthropologist I am grateful to have had a front row seat in many organizations (mostly large companies) over the last 35 years as they worked to change, grow, innovate, and learn. No matter what the challenge, I am always an ethnographer, seeking to understand context from the perspective of participant/observer. How does a particular culture make meaning? How does that meaning impact all aspects of leadership, culture, and performance? What is possible?

One pattern stands out from all that fieldwork among corporate tribes. In 1992, I called it "Outcome Orientation." Today I think of it as "The What/How Imbalance."

Here's what I've learned.

There are only four things that matter: Why, What, How, Results (Business and Human)

The WHY
We've gotten better at this one. “Why” is a question of context and meaning. In today's highly interconnected world, it is critical that people understand the meaning of their work in a larger context, which includes a competitive environment, customers, strategy, mission, and values. Understanding one's worth in the bigger picture is critical to hope, engagement, and aligned action. Understanding the context of the “other,” be it through the revolution in consumer insights toward more contextual approaches, globalization, or use of whole system dialogue, creates empathy and deepens “Why” conversations. My observation is that leaders have stepped up their game in terms of sharing the “Why” story in more compelling and holistic ways, connecting the dots between today's choices and the bigger picture.

The WHAT
Has always been our strong suit. We live here. We are all about action.

The HOW
The poor step-child. Process, and more importantly, how process choices and enactment impact results. In short, how we work together. It's not that we don't have values and mission statements. But do we connect them to everyday behavior?

Our daily interactions create our culture. Too often, unless there is a crisis, we don't do the work necessary to connect behavior, process, learning, and results. There are many reasons for the imbalance:

- Reflecting, learning, and making adjustments together as a system, authentically, and in a timely manner are still relatively terra incognita.
- It is still hard to see, touch, know, change, evaluate, and learn.
- It is very often hard to "discuss" (thank you Chris Argyris).
- It requires leadership skills and patience.
- It takes time. That is a reason and an excuse.
- It is still framed as either/or rather than seeing the synergistic marriage of both/and.

Many have used the metaphor of a sailboat for organizations. It's an excellent way to see the imbalance.

Imagine a sailboat.

The WHAT is the boat, the sails - everything visible.

The HOW is the keel - balancing, steering, enabling, strengthening. Completely invisible. Submerged.

Everyone's job seems to be making the sail bigger or keeping it from shredding. That is where the focus of attention is. It is often what people are incented for. Meanwhile, the keel gets little attention. How often is it checked? Does it have barnacles invisibly creating drag? Is it deep enough to balance all that sail? Constantly growing sail without a keel to match...you can imagine what happens.

The HOW needs work.
Back to Chris Argyris, do the words we say and espouse in our Mission and Values get reflected in everyday behavior? Do we have ways of seeing, listening, and dialoging systemically? Does our data (numbers and stories) enable the authentic conversations necessary for timely, individual and group learning? Do we have the skills and the mindset both to execute and to know when to have these conversations? Are the right people in the room when we make process decisions?

I see a lot of progress. I also see a huge need and opportunity for those of us from different disciplines who bring these process tools and perspectives. We need to be sure we are helping the system convene important and authentic conversations, (thank you Meg Wheatley). We need to help create indigenous, practical, and useful learning skills and mindsets. We need to pass on our skill and knowledge in terms of all of the above so that this capability resides in the organization. We need to be voices for systemic and holistic solutions.

I close with my favorite equation. I learned it from Reg Revans, one of the fathers of organizational learning. He makes the case perfectly. It's always an eye-opener. His biologically based "law" is: If an organism (organization) is to survive, let alone thrive, its rate of learning must be the same or greater than the rate of change in its environment:

$$L \geq C$$

Learning, and learning how to learn, rests entirely within the How. The journey must be as transparent, valued, strategic, and examined as the destination.

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Figuring Things Out: A Guide for Practitioners

By Barbara Cartieri Timony

Among the many tools and techniques in the OD practitioner's toolkit, the most essential is the ability to accurately diagnose client and organizational needs. In fact, the initial discussion is a key aspect of the methodology. It is important because it is foundational to developing targeted solutions, and because it enables detailed examination of clients' expressed and unexpressed (potentially unknown) needs. This article guides OD practitioners through the why and how of this discussion by presenting three major process points along with thought- and discussion-starters that can be a reference for an initial client meeting. The information can be used by OD practitioners in an internal or external practitioner/consultant role.

Slow Down to Accelerate

Although it may seem counter-intuitive, taking time to work through the initial phase can actually accelerate subsequent phases in the development of solutions by eliminating guesswork and assumptions that may result in re-work and avoidable delays. A thorough analysis sets the stage for a well-reasoned approach to OD interventions. Conversely, without the information that is gleaned in a detailed discussion, the potential for solutions to add value and meet business goals is, at best, uncertain.

The deliberate process allows practitioners to understand the client's need at a deeper level by peeling away the layers of the client's knowing. Unspoken biases and preconceived ideas about the emergent issue such as its origin, cause, perhaps even the expected solution can surface. Be attentive to the latter, however. If clients present their own recommendations, there may be a tacit expectation that you will act on them. The risk in doing so is being seen as an "order taker" rather than a consulting partner. Do pay attention to data points that help identify the type and level of support appropriate to the perceived need rather than making assumptions or reaching unsupported conclusions.

Collaborate and Consult

A collaborative working relationship with clients is always recommended, and can be effectively leveraged in the initial discussion. Establishing a strong relationship allows practitioners to consult and challenge effectively, posing the "tough" questions that lead to workable and practical approaches so that effective plans can be developed. Such trusting relationships are realized by those who demonstrate a clear grasp of the business and are laser-focused on improving performance and achieving business goals.

Business leaders are strategic levers into the organization. At an operational level, they can provide insight into staff and organizational vulnerabilities. As such, they are uniquely qualified to identify performance issues within their business units, and their perspectives are key to resolving them. Engage them. Get to know the business – specifically, the goals that your client's business unit is driving toward so that you can determine what optimum actually looks like. Finally, help the client to ensure that staff performance is maximized to achieve those goals. This partnership is a critical element in improving individual and group performance. Whether you are an internal or external practitioner, cultivating this type of relationship with clients is a winning strategy.

With regard to feedback to the client on solutions, practitioners add value when they are crystal clear about the what, how, and why of their approaches. In that regard, remember to be sensitive to your client's need for a high degree of clarity and transparency. This can be accomplished most effectively by using "plain talk" – that is, by setting aside jargon and technical terminology that is particular to your discipline. Instead, use industry- or organization-specific language that is understandable to clients to discuss your feedback, conclusions, and any recommendations that follow.

Probe for Clarity

Questioning in this context is a blend of logic, reasoning, and feedback. Using targeted questioning techniques to clarify the client's goals and priorities helps to illuminate the client's main areas of concern. It also provides the practitioner with unique perspectives that may not have been apparent prior to the discussion. Probing below the surface to understand business issues at a deeper level is a critical success factor in the development of effective and measurable outcomes.

Consider the following questions. They can be used as discussion starters when meeting with your client. Build on them to get beyond topical responses – most importantly, probe for details.

1. What is the presenting, perceived issue? Talk to your client about what is happening, why s/he needs your assistance – what is the client's perception of what is problematic or what is getting in the way. What organizational change is imminent and what is the expected impact. What is the critical need or concern?
    - Be alert for signals that the client sees any intervention as a panacea for low performance.
    - Listen for signs that the client is abdicating his/her responsibility to deal with performance issues, looking instead for someone to "fix" the problem.

2. What has been done so far to address the issue? Probe to focus on what the client has done to help (or hinder) progress toward improved performance.
    - Determine what the client is willing to invest in terms of time and money to resolve the issue.
    - This area of questioning connects back to the criticality or urgency of the issue.

3. What does success look like? It is important to have the client articulate, in practical terms, how s/he will know that the desired organizational effectiveness goals have been reached, and how this will be measured.
    - Improvement may be expressed in qualitative and/or quantitative terms.
    - When you and the client are clear about the success criteria, you will be able to collaborate to develop a method for data gathering and assessment.

Summary

Expert detective work is a capability that separates "order takers" from business-focused professionals who see their discipline as a core business process. The practitioner's role as detective is an important way to provide optimum service to clients and to help the business continually focus on the achievement of its purpose.

Practitioners who come to the table with sound approaches for identifying emergent issues for their clients position themselves - and their clients - for success. They are keenly aware that a systematic approach coupled with carefully crafted questions, advances their goals, which are tied to individual and organizational effectiveness. These exceptional practitioners don't just listen to their clients' concerns; they involve clients in problem-solving, inviting them in so that together they can focus on results that have a positive impact on the organization.

Ultimately, when clients see the issues from the inside out by virtue of these detailed discussions, they become part of the solution. With that, they are better prepared and willing to reinforce the strategies and plans through on-the-job coaching, mentoring, and continued collaboration with skilled practitioners.

In addition to direct benefits, such as defining a way forward, there are valuable indirect benefits to be gleaned when collaborating with business clients. In the short term, working with clients at this level boosts engagement and hones the working relationship. Long-term, it increases clients' confidence in the value that OD practitioners contribute to the business.

Barbara Cartieri Timony, EdD, is an experienced OD & Learning consultant with extensive background in organizational change, leadership development, and instructional strategies. She has worked as an internal and external consultant in global pharmaceuticals, aerospace, and healthcare. She is an adjunct professor in Villanova University's HRD degree program. She can be reached at profbct@yahoo.com.