Proactive Review - Learn from Experience to Improve Bottom Line: An Educational Design for Knowledge Discovery and Knowledge Creation

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ABSTRACT

This article aims to provide a theoretically based and proven educational design for lessons learned. Called a Proactive Review, this educational design is exemplified in a case study of a global information technology company classified as big business, where Proactive Reviews were developed and implemented in over 40 countries. This article explores how employees who solve a task together can learn from the experience and share this learning with relevant colleagues to improve work practices, services, and/or products. This article describes the format of Proactive Reviews, suggestions for starting points called PR Triggers, and the four roles involved—the participant, sponsor, top management, and facilitator. The tangible and intangible results of Proactive Reviews are presented, with their impacts on the participants; their teams; and the organization’s products, services, and/or work practices. Finally, the article provides recommendations for implementing and maintaining Proactive Reviews in organizations.

KEYWORDS

Big Business, Classes of Learning, Facilitation, High Tech, Knowledge Creation, Knowledge Sharing, Lessons Learned, Organizational Learning, Work Practices, Workplace Learning

INTRODUCTION

Value creation in the Western world has come to rely more heavily on intangible resources. This shift from an industry-based to an information-based economy demands new organizational capabilities and human skills (Qvortrup, 2000), which in turn depend on a systemic capacity to learn continuously (Easterby-Smith & Prieto, 2008). At the macro level, there is growing evidence that organizations produce superior results when they have the capability to facilitate the necessary interactions to support and advance knowledge creation and use (Akhtar & Khan, 2011; Holsapple & Wu, 2011; Chang, 2016). Enabling employees to learn in the context of work helps improve business results, competitive advantages, and revenues (Nonaka & Takeuchi, 1995; Chang, 2016) by upgrading work practices, services, and/or products (Elkjaer, 2003). At the micro level, this article seeks to answer the question “How can employees, who solve a task together, learn from the experience and share this learning with relevant colleagues to improve work practices, services, and/or products?”

This question stems from the top management of a global high-technology company. The top management had realized that mistakes and failures were repeated, whereas successes were not replicated to the same extent. Consequently, it asked for a process that enabled its employees at all hierarchical levels to learn from experience. The requirements for the process were that it should
be easy to understand, communicate, and implement in most of the 60 countries across Europe, the Middle East, and Africa (EMEA) and should incur low costs. This article describes the theoretical background for the suggested solution called a Proactive Review. Finally, the article provides a real-life example of a Proactive Review, as well as recommendations for successful Proactive Reviews.

First, this article explores the term “learning” based on Bateson’s (1972) theories, followed by considerations about learning from experience in the context of work. In this regard, the article draws on the work of Nonaka and Takeuchi (1995), who point out four ontological dimensions of learning, namely, individual, team, organizational, and inter-organizational learning; the term “knowledge conversations” is then discussed. Second, the article presents an educational design for lessons learned called a Proactive Review and discusses what should initiate the process and what roles are involved. Third, the theories are illustrated by an example of a Proactive Review, including the tangible and intangible results achieved. Finally, some recommendations for successful Proactive Reviews are offered.

LEARNING IN THE CONTEXT OF WORK

This section explores the four dimensions of learning, starting with individual learning as described by Bateson (1972), whose viewpoint is drawn into considerations about learning in teams in the context of work and organizational learning (Elkjaer, 2013; Engeström, 2001; Gherardi, 2001) including the lessons learned (East 1998). It becomes clear that the environment is important for the process of learning, and this section ends by briefly describing the requirements for successful lessons learned.

Individual Learning

When an organization’s top management decides that the employees should learn from their experiences in a structured way, the management needs to consider its own perception of learning, as well as the situations from which it wants the staff to learn (Elkjaer, 2013; Engeström, 2007; Nonaka and Takeuchi, 1995; Wenger, 1999). The global information technology (IT) company had many years of experience in training, online courses, and online certifications but realized that these were different from learning directly from individual or team experience (Rao, 2003). The top management lacked theoretical insights into “learning.” To establish a common understanding and to leverage expectations, the term “learning” needed to be explored and explained. The top management perceived learning as a simple concept in which people would learn from classes and online courses, and such learning could be tested in exams with certifications. However, learning from experience is different, as evident in the work of Bateson (1972), who distinguished among the following four classes of learning:

**Sensing:** A stimulus is sensed but elicits no further response. The learners will change nothing in their behavior. For example, they feel cold but do not do anything about it. Because the stimulus does not cause a change, this is called zero learning (Bateson, 1972).

**Realizing:** The learners receive a stimulus and choose a response from a set of alternatives. For example, they feel cold, so they put on jackets or go indoors. This is called class-one learning (Bateson, 1972).

**Adapting:** They receive a stimulus and incorporate the context before they react. They are aware of repetitions and consider how to learn from repeated experiences. For example, they feel cold every winter, so they install fireplaces in their houses. This is called class-two learning (Bateson, 1972).

**Changing:** They receive a stimulus and then change the context as part of their reaction. The double bind is a prerequisite for this class-three learning. For example, they feel cold every winter, so they put on jackets and warm up their houses. They are still bothered by the cold, so they decide to move far away to a new and warmer environment (Bateson, 1972).
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