

Fact-File 2: Unpacking the 5 Disciplines ...becoming a Learning Organisation



Extracts from our Guide on Learning for Success: Becoming a Learning Organisation

The Rise of Learning Organisations

The idea of 'learning organisations' is far from new. It's been around for more than 15 years and has gradually become an increasingly widespread organisational and management philosophy.

Peter Senge first popularised the concept with his 1990 ground-breaking book, *The 5th Discipline*. It pulled together research into how organisations build learning capacity and why some seem to use learning better than others. He called those that were successful at harnessing the potential of learning, 'learning organisations' – a label so widely used today it's become part of the mainstream mythology of organisation literature.

"A learning organisation discovers how to tap people's commitment and capacity to learn at all levels...where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free and where people are continually learning how to learn together." Peter Senge

More than merely a business best-seller, *The 5th Discipline* propelled Senge into the front row of management thinkers, created a language about change all kinds of companies could embrace, and offered a vision of workplaces that were humane and built around a culture of learning.

Since the publication of Senge's seminal works, much has been written on learning organisations and the concept's been tested and tried in many different organisation contexts across the globe.

Some would say it's a bit of a holy grail. Like any ideal, the perfect 'learning organisation' is not an attainable goal, but rather a desirable and useful set of guiding ideas and principles for people and organisations to aspire towards.

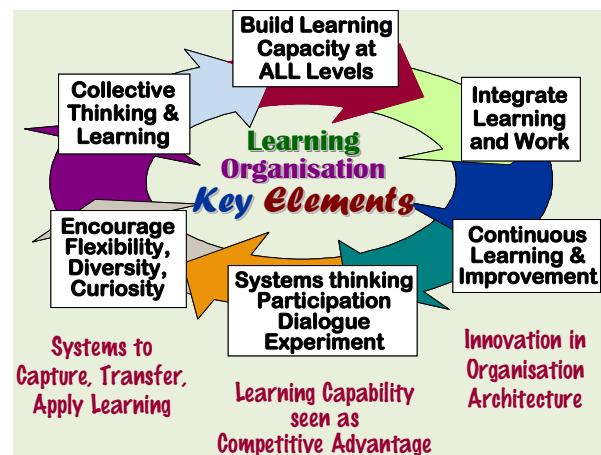
What's a Learning Organisation?

Becoming a learning organisation is an ever-evolving and ongoing process of adventure, discovery, testing and experimentation – not a series of steps or a program you apply cookbook style to what is going on in your organisation.

For a start, there's more to being a learning organisation than just amassing knowledge. Every organisation creates and uses knowledge.

The challenge is that few seem to actually learn how to manage it, apply it, grow through it and use it effectively.

There's also no one correct formula to create a learning organisation. Different organisations try different processes, strategies and systems to share learning, acquire knowledge and turn it into the capacity to learn for change, re-learn and continually improve.



So what key elements do learning organisations have in common? While there's no one single model or standard prescription, all learning organisations to one degree or another:

- Display visible commitment to building their capacity to learn at all levels
- See learning as a core, essential activity and learning capability as competitive advantage
- Steer people towards a collective vision – unified by shared beliefs and values
- Foster 'togetherness', collective thinking and team-based, not just individual, learning
- Integrate learning with working – continually 'work to learn and learn to work'
- Redesign organisational architecture and develop more flexible, fluid work structures
- Focus on creating learning opportunities and purposely encourage flexibility, diversity, innovation and new ways of thinking
- Establish systems to capture, share and build learning and apply and transfer knowledge and skills quickly between work areas
- Regard unsuccessful experiments as a valid part of the learning process – as lessons learned.

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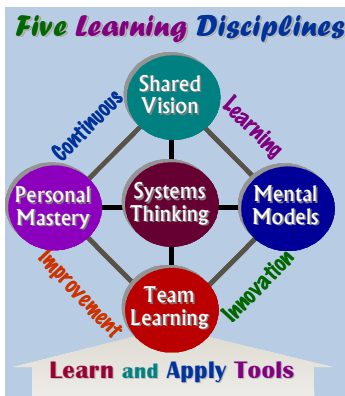
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- Develop an ongoing capacity to learn, re-learn, change and improve and feature widespread participation in decision making, dialogue, and information sharing

"Learning organisations are those with the habit of learning... how to continually renew, reinvent and reinvigorate themselves in an uncertain world where change is not only happening fast, but also in a discontinuous form." Charles Handy

Learning & the 5 Disciplines

Senge sorted some of the main practices that define learning organisations into what he called The Five Disciplines – *Shared Vision, Mental Models, Personal Mastery, Team Learning* and *Systems Thinking*.



Each is made up of a set of tools, precepts and practices to build organisational, team and also individual learning capability and promote more learning-focused behaviour and work cultures.

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According to Senge, learning organisations learn to thrive on change and constantly innovate by methodically cultivating these five disciplines. They may never be fully mastered, but learning organisations practice them continuously. **The 5 Learning Disciplines in brief are:**

- ◆ **Shared Vision:** The key vision question is 'What do we want to create together?' Leaders and teams learn tools to create a shared vision and mutually agree the learning targets, improvement strategies, challenge and goals to get there.
- ◆ **Mental Models:** are beliefs, values, mindsets and assumptions that determine the way we think and act. Leaders and teams learn to use tools to practice making their mental models clearer to each other, challenge each others' assumptions and build understanding.
- ◆ **Personal Mastery** is centrally to do with 'self-awareness' – how much we know about ourselves. Leaders and teams use tools to enhance the quality of their interaction and

appreciation of the impact their thinking and behaviour patterns have on how we approach situations, problems and each other.

- ◆ **Team Learning** happens when teams start 'thinking together' – sharing their experience, insights, knowledge and skills with each other about how to do things better. They learn to develop critical reflection skills and conduct more skillful discussions with each other.
- ◆ **Systems Thinking** is a framework for seeing interrelationships that underlie complex situations rather than simplistic linear cause-effect chains. Leaders and teams learn to systems map situations, events and problems and find better (often not obvious) leverage points in a system for change/improvement.

The rest of this fact-file looks into what each discipline is about in a little more detail.



The 1st Discipline: Shared Vision

When an organisation or team collectively create a shared vision and guiding principles to get them there, this provides common focus, commitment and a sense of mutual purpose. Building a shared vision starts with leaders. It means:

- Employing tools and approaches that foster genuine, active commitment and positive enrolment, not resigned compliance. With shared vision, people do things because they want to, not because they have to.
- Empowering everyone to participate in the dialogue, planning and visioning processes that help shape an agreed shared vision

Shared Vision also guides how teams learn, work together and relate to each other and the kind of learning climate they want to create on the way.

"A genuine vision breeds excellence and learning because people in the organization want to pursue these goals... Shared vision is vital for learning organisations that want to provide focus and energy for its employees. In fact, you can't have a learning organisation without shared vision. The overarching goal that the vision establishes brings about not just commitment but new ways of thinking and acting. It fosters risk-taking and experimenting. It also encourages a commitment to the long-term." Peter Senge 5th Discipline Fieldbook p. 17

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When you think 'Shared Vision', don't think only traditional vision and mission statements. The biggest struggle leaders face is getting vision and values 'off the wall and into the hearts and minds' of people in ways that make meaning and sense to them.

The 2nd Discipline: Mental Models



Mental models is about managing our mind-sets – the way we think and create meaning about things.

They're deeply ingrained beliefs, and assumptions that influence how we make sense of the world, perceive events in it and actions we take. They can be subtle distortions of reality or gross misapprehensions of it – but one thing is certain: the mental maps we use are not reality – only our approximation of it.

Mental models provide our model of "reality" – we interpret everything against them. They help explain what we perceive and influence the way we think and act and they shape our values and assumptions and determine the way we interact with others.

"...Because mental models are usually tacit, existing below the level of awareness, they are often untested and unexamined. They are generally invisible to us - until we look for them. The core task of this Discipline is bringing mental models to the surface, to explore and talk about them with minimal defensiveness - to help us see... the impact on our lives and find ways to re-form (...them...) by creating new mental models that serve us better in the world." Senge *Fifth Discipline Fieldbook* p. 236

Worse still, we rarely question how up-to-date our mental models are; we assume the mental maps we use are the same as everyone else's and we confuse our own mental models mistakenly with reality. The discipline of 'mental modelling' means:

- ❑ Making our assumptions and inferences more transparent to us and to others
- ❑ Surfacing our own personal pictures of the world and rigorously scrutinising them.
- ❑ Increasing awareness of our own and others attitudes, beliefs and perceptions that influence thinking, behaviour and interactions

- ❑ Continually re-evaluating our mental models them to increase our capability to better govern our own actions

A 3rd Discipline: Personal Mastery



Personal Mastery is the most elusive of the 5 Disciplines – because it is centrally to do with inner-work on our selves. It resembles ideas associated with personal empowerment, emotional intelligence and self-awareness. It means *turning the mirror inwards on ourselves*. It starts by clarifying the things that really matter to us.

Some premises underlying the practice of personal mastery are:

- ❑ *Personal Purpose and Vision* – having a clear focus on "How can I make a difference?"
- ❑ *Personal Values* – being guided by and acting out from a clear set of values.
- ❑ *Personal-Perception* – seeing ourselves more accurately. This also extends to how you see other people, events and situations too.
- ❑ *Emotional Self-Awareness* – knowing how our emotional patterns and behaviour affects others. It involves a "commitment to truth – a relentless willingness to uncover the ways we limit and deceive ourselves" (Senge)

"At the heart of a learning organization is a shift of mind - from seeing ourselves as separate from the world to connected to the world, from seeing problems as caused by someone or something 'out there' to seeing how our own actions create the problems we experience. A learning organization is a place where people are continually discovering how they create their reality. And how they can change it." Peter Senge

The 4th Discipline Team Learning



You may be think individuals learn all the time: that it's impossible to have a learning team or organisation *without* learning individuals – and you'd be right.

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“...while individual learning always has been and will continue to remain important, real competitive advantage is derived from understanding how to systematically create, use and improve knowledge to make the leap from individual learning to institutional learning, which has a much greater business impact...”
Pasternack & Viscio *The Centreless Corporation* p.115

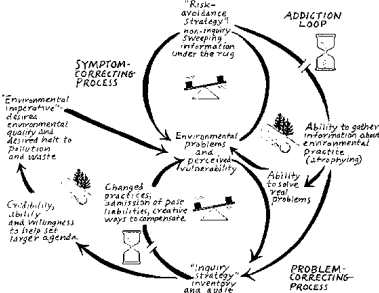
But individual learning doesn't seem to help organisations learn. The learning ability of the team, in Senge's opinion, is greater than the learning ability of any individual in it.

- ❑ The biggest barrier to team learning is making the move away from ingrained habits of individualism and established models of individualised work.
- ❑ Team learning means an organisational commitment to work together synergistically – the learning and capacity for thoughtful, more effective action of the whole team is greater than that of any individual member.
- ❑ It's only when two or more people start thinking together collectively – sharing their experience, discoveries, insights, knowledge and skills with each other about how to do things better – that real learning starts.

Through *Dialogue* and *Skilful Discussion*, teams in learning organisations work to enhance the quality of their conversations in order to mobilise their collective thinking energy to get the best results and learn from each other. They find new ways of thinking, working, learning and improving together and work collectively on activities. They increase their capacity to think together.

The 5th Discipline: Systems Thinking

Senge sees *Systems Thinking* as the 5th Discipline because it's the one that fuses the others all together.



Systems Thinking is based on the proposition that the world is not created of separate, unrelated parts; that 'wholes' and connectedness are a truer reflection of the way systems work than our western tendency to

dissect, fragment and break things down. It provides teams and organisations with better abilities to:

- ❑ See processes and patterns more clearly – as a bigger picture of wholes, rather than disconnected parts or singular events
- ❑ Better understand interdependency and deal more effectively with the forces that shape the consequences of our actions.
- ❑ See deeper interrelationships behind complex situations rather than simplistic (and mostly inaccurate) linear cause-effect chains
- ❑ See how simplistic solutions only shift a problem somewhere else and how actions have different consequences in different parts of the same system.

Working with the 5 Disciplines

Sometimes it's difficult to work out where to start work on the 5 Disciplines. Some say they just want to 'do *Systems Thinking*' or 'work on a *Shared Vision*' and leave *Personal Mastery* or *Team Learning* out of the picture. Trouble is – they can't, because as you've probably realised by now, all the Disciplines are inter-linked.

Do I need to build a *Shared Vision* first with my team? *But hold on – I can't really do that until we start having better conversations* (Team Learning). Can I start by using *Systems Thinking* to map out with my team a few problems that keep repeating themselves at work? *But wait – they'll need to understand assumptions and Mental Models if that's going to be worthwhile...*



Because of their inter-connected nature, it doesn't matter where you start. The Disciplines are like 5 fingers of the same hand. This doesn't mean trying to work with all 5 Disciplines at the same time. There's nothing wrong with concentrating on one (and we say no more than 2 at a time) of the Disciplines first and working your way onto the others serial fashion.

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