

The Learning Organisation - From Metaphor to Model

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Abstract

With the advent of initiatives such as clinical governance, health care professionals are increasingly faced with the apparent paradox of embracing change with all of its seemingly negative connotations and with grappling with the opportunities to create vibrant healthy organisations in which all members of staff can make a positive contribution to the well-being of the organisation.

Total quality management, business process re-engineering and many other initiatives have today been largely superseded by the more overarching goal to become a learning organisation. This concept embodies many of the more contemporary notions of good practice in the development of all employees whilst simultaneously creating a climate of participation, contribution and support in which employees are valued and their talents employed for the benefit of the whole organisation. Clinical governance, for example, has apparent undertones of similar aspirations in that it offers opportunities for health care organisations to establish personal development programmes linked with organisational strategies.

In this article I will firstly explore the concept of the learning organisation before establishing a three-dimensional model that can allow health care professionals to understand how the concept may be developed in practice in their organisational contexts.

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Introduction

At the beginning of a new millennium it is perhaps apposite that researchers and practitioners in many fields of work are beginning to reflect on their current practices and are preparing and asking searching questions about whether current forms of organisation are appropriate to succeed where market and environmental trends as well as and new technological developments demonstrate that the only constant is the inevitability of change. It is widely understood that what might have passed previously for reasonably effective organisational strategies are quickly becoming outdated and ineffective in dealing with modern pressures and demands. The increase in health care related litigation in the UK, for example, has highlighted the intense stress the NHS is under to improve how it learns from its mistakes and how it embeds that learning into future practices. Who could have predicted ten years ago the exponential growth in the use of alternative therapies and the increase in GPs trained to administer homeopathic care with all of its related philosophical divergences from traditional allopathic treatment?

In recent years, concepts such as total quality management, business process re-engineering and just-in-time management, amongst others, have entered the commonplace vocabulary of business managers and researchers. Equally, quality, responsiveness and flexibility are terms that public sector managers are as

The learning organisation concept is the latest in a long line of business-related concepts that has generated a great deal of interest and debate. According to one author,

a few years ago, if asked to describe a learning organisation, most people would have referred to organisations where learning (at least allegedly) took place. They would have had in mind schools, colleges and universities, despite the fact that, for many people, these were places where very little useful learning was achieved (Pearn 1996).

What has changed in recent years is the increasing interest of large businesses in the learning organisation concept. For instance, the industry-based examples provided in a book on the subject published by the Economist Intelligence Unit [\[2\]](#) include, amongst others, Levi-Strauss Ltd, 3M, Nokia, Raychem Corp and Skandia Insurance Co. Membership of the European Consortium for the Learning Organisation [\[3\]](#) includes Sara Lee, GlaxoSmithKline, Deutsche Telekom, Allianz, Janssen Pharmaceutica and IBM, amongst others. What these organisations share is a belief in the power of the learning organisation concept to offer a positive image that facilitates the development of new people and organisational development policies and practices. As a metaphor for organisational change based on the principles of learning, more humanistic work organisation and trusting relations, the "learning organisation" challenges previously held dominant beliefs about organisational behaviour and change.

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A Historical Perspective on the Learning Organisation

The concept of the learning organisation can be traced back to the 1950s and 1960s. Burns and Stalker (1961) first postulated their typology of mechanical and organic systems following lengthy studies of a large number of companies and their management styles in Britain during the 1950s. A quarter of a century later, an empirical study of 110 factories in the US provided convincing evidence to support the importance of "organic" organisations for effective research performance (Hull 1988).

It was around the late 1980s that the concept of the learning organisation emerged in the business related research literature. Hayes, Wheelwright and Clark (1988) in the United States and Pedler, Boydell and Burgoyne in the UK developed their ideas during the 1980s, a decade heavily influenced by action learning theories and organisational learning theories. Mike Pedler and his colleagues adopt the term "company" rather than "organisation", which they consider impersonal. According to these authors the word company embraces ideas surrounding collective approaches to life "in company" with others to explore how best to work together.

Peter Senge is amongst the most influential writers to promote the concept of the learning organisation in which, he argues, five dimensions (Senge calls them disciplines) are present: systems thinking, personal mastery, mental models, shared vision and team learning. Together, according to Senge, these dimensions create an environment in which the organisation becomes more dynamic and its constituent parts share common goals.

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Incorporating Metaphor into A Definition of the Learning Organisation

In 1991, the Japanese researcher Professor Ikujiro Nonaka published an influential article in the Harvard Business Review. In this article he argued that Japanese companies would be more innovative and successful than their Western counterparts because they tapped into the implicit knowledge of their employees. According to Nonaka

the centrepiece of the Japanese approach is the recognition that creating new knowledge is not simply a matter of "processing" objective information. Rather it depends on tapping the tacit and often highly subjective insights, intuitions and hunches of individual employees and making those insights available for testing and use by the company as a whole.

"Western" thought patterns to those of Japanese managers, who, he argues have often utilised metaphors as the most powerful means for converting tacit knowledge into explicit knowledge. Professor Nonaka may be correct in his interpretation of managerial thought patterns, although he does seem to have ignored the important epistemological debates especially amongst theorists such as Habermas who have challenged the apparent domination of empirical logical knowledge development (Cressey & Kelleher, 2002).

It is possible to propose a definition of the learning organisation that complies with the use of metaphor.

The learning organisation is a powerful metaphor and force, enabling the development of new values and new ways of seeing the world in which the organisation operates.

Like the managers in successful Japanese firms described by Nonaka, Western practitioners interested in the learning organisation metaphor have sought ideas and models that enable senior colleagues and employees to understand intuitively that the change processes necessary to meet the demands of modern environments can be positive rather than negative experiences. Metaphors can appear contradictory and that of the learning organisation is no exception. How can we speak about organisations learning? Surely only individuals learn? Combining the two words - and concepts - sets up potential conflicts, yet as practitioners attempt to find ways to reconcile those conflicts their actions make the concept explicit.

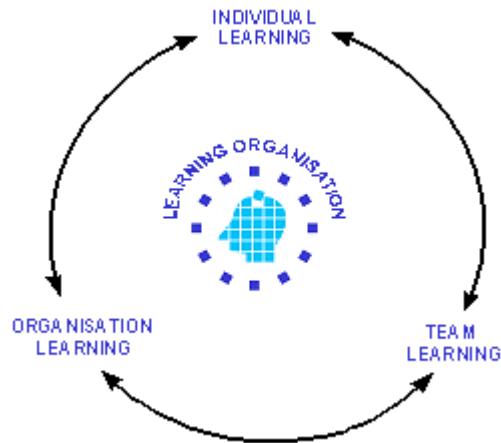
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A Three Dimensional Model of A Learning Organisation

The learning organisation concept has been used by organisations, in both the public and private sectors, to help employees make sense of the current turbulence and to seek ways of harnessing individual talent for the benefit of these individuals and the organisation as a whole. As set out above, Nonaka suggests that metaphors trigger the knowledge-creation process. The next phase would be to create analogies that enable a more structured step in the creativity process. Analogies enable the ideas expressed in a phrase to be compared - how are they alike and not alike. The last step in knowledge-creativity is to create an actual model that is more tangible than a metaphor or analogy. Models would inevitably be more logical than the previous two steps. The remainder of this section describes one model of the learning organisation that embraces both theories of learning and organisation.

My own research into social partnership and human resource development shows that innovative private sector organisations in four countries are creating learning strategies consistent with Watkins and Marsick's approach (1993) [\[4\]](#). The case studies included British Telecom, Rover, Fiat and Volvo, Telia, Deutsche Telekom and Deutsche Bank. The learning organisation debate recognises that learning is not just the province of the individual but extends to groups or teams learning and, crucially, to how organisations learn, solve problems, evaluate solutions and create feedback. These three domains of learning move the debate decisively from the province of task repetition, qualifications, training, measurement and falsification in order to focus on the real development of the individual, group and the organisational practices and procedures for each that can stimulate innovation.

Figure 1. A three dimensional model of a learning organisation [\[5\]](#)



Individual Learning

This may be obvious. In fact, initial reaction to the learning organisation concept was often couched in terms of the belief that people learn, "not organisations". It is essential that all organisations aspiring to become learning organisations must support and sustain the learning of all its employees. Personal development plans, such as those employed by many organisations in the UK, serve as excellent platforms for creating environments in which all members of staff consider their own growth through learning. Such initiatives should also involve an increased responsibility for managing individuals' own learning.

Traditional education and training programmes, when organisations use them, often play an important part in the individual learning dimension. It is important to stress that informal learning, especially learning integrated into work tasks and responsibilities is probably just as, if not more, significant. Whilst the control of formal learning lies with the professionals responsible for teaching and training, individuals would obviously experience less control and quite possibly less ownership over their learning. A shift in the locus of control over learning would place demands on vocational training providers to develop new roles and skills in facilitating effective and long-term learning.

Team Learning

Teams are collections of individuals and also entities in their own right. As more and more working situations are organised using teams of varying sizes and duration, team learning has become an important factor in organisational development. The transfer of learning experiences between the team members and also between other teams is a key ingredient here. It is important to stress that it is "team learning" and not simply "team working" that is important. Creating the ideal environment for effective learning in groups and teams is as important as ensuring that individual learning takes place.

Team, or group, learning has different components to individual learning that, naturally, involve the social aspects of learning with others. Pooling knowledge, understanding the limits to the team's knowledge of any given situation and the sharing of possible solutions to any given problems are all key components in team learning environments. Do not underestimate the importance of minority views where they exist, as these help the team to view alternative perspectives and options. As with individual learning, unconscious behaviours need to be recognised and understood if team learning is to be successful. Research over many years at the Tavistock Institute has shown that the ideal group size for maximising learning is between five and seven members (Griffey, 1996).

Organisational Learning

It is within this domain that the learning of individuals and teams becomes embedded into the fabric of the organisation. Systemic thinking allows analysis of organisational blockages to learning. Effective systems must allow for free and lateral communication flows in order to enhance learning at all levels in the organisation. Information technology systems can be appropriate but this would probably depend on the size of the organisation and the extent to which the interface between humans and the technology

skills they might need in the next twelve months. With peer support (or the input of a team leader) these plans can act as foundations for creating training programmes that benefit all of the health care professions.

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Knowledge Management and Organisational Learning

Building an organisational memory is useful in order not to lose the learning of individuals and teams. After so many years of "downsizing", how much learning has been lost to the organisation through initiatives such as early retirements? Organisational memory can be facilitated through the use of information technology systems but can also be captured in traditional paper formats, books, reports, etc. The key to this is to create effective storage and retrieval systems so that those who need to can access knowledge resources at the right time and in a format that enables easy understanding.

This engenders a need to consider the processes of knowledge management alongside those of organisational learning.

The establishment of environments in which learning is maximised and made most effective is a vital ingredient. Learning how learning has taken place and supporting individuals and teams to understand how they have learned new tasks and responsibilities is vital.

Organisations do not exist in a vacuum. It is important to learn how best to scan the boundaries of the organisation. This involves examining good practice elsewhere, becoming alert to market and other economic factors that may impact on the organisation and understanding more fully the impact that existing practices may have on customers and suppliers. Changes desired by organisations may also have implications for relationships between those organisations and external agencies and institutions upon which they may be dependent in the future. The involvement of suppliers, customers and other agencies in collaborative organisational learning and knowledge creating processes is a desirable extension of this increased environmental awareness.

All of this requires individuals to commit themselves to behaving honestly and to building levels of trust in order to maximise learning opportunities. If we cannot trust what we are hearing or cannot trust that people would act in a professional manner following periods of mutual understanding how can learning be profitable and positive? Trust has been identified as the most important ingredient in successful innovatory companies.

Mistakes do occur. What happens to the lessons learned from those errors? How are they used to create improvements? These are important issues in learning organisations. Seeing mistakes as key learning experiences enables organisations to end or prevent blame cultures and to create environments in which risk taking and experimentation are seen as healthy and necessary for organisational growth.

There also needs to be shift from control mechanisms to empowerment and this requires managers and team leaders to develop leadership skills. This is not to claim that managing should be completely abandoned in favour of leading but that the whole balance of the role of senior people should be re-focused in favour of the latter. In fact, The Benefits Agency in the UK, for example, has established that far from being the exclusive domain of senior people, leadership skills are essential to all of its employees (Guile & Fonda, 1998).

Coaching skills are also now recognised as essential part of the manager's toolkit and the same skills are needed by trainers and others responsible for ensuring learning opportunities have a long-term effect on performance. In fact, change management may become a specific skill and role in itself. A shift in role from training and development managers of HRD professionals would inevitably demand new skills and roles that can be characterised as facilitators of learning and/or internal consultants. The resultant definition from this model suggests that a learning organisation is one that establishes a journey of individual, team and organisational growth through learning and integrates each of these in a holistic and coherent strategy.

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Summary

In summary, the learning organisation concept has captured the imagination of both researchers and practitioners alike. It has acted as a force for discovering new ways of living, working and learning together and can act as a catalyst for change that can only be positive. As the world around us continues to change rapidly, new challenges will emerge that have yet to be identified. Like the learning organisation concept, they will force us to re-consider our strategies, to step back from our operational activities and to recognise our new environments. We cannot foresee what these new challenges will

