

Guide to Action Reviews – A Proven Method for Learning *While* Doing

What is an Action Review?

An Action Review (AR) is a quick and simple team learning process held while work is being performed, usually during a break in a process, activity or task. It is intended to help teams ‘learn in the moment’ and transfer knowledge immediately into the work at hand, as opposed to learning after a major project or activity has been completed. It was originally designed by the U.S. Army and is based around just four simple questions:

1. What was supposed to happen?
2. What actually happened?
3. Why were there differences?
4. What can we learn and *do different right now?*

An AR is designed to quickly identify key lessons and immediate actions to both the team and individuals, and to build relationships, trust and confidence among team members. All it takes to begin running an AR is a commitment to open discussion, a little time, and paper and pencil to record the results.

When to have an AR

Plan for the AR immediately after a natural break in any work activity. For example, after a proposal meeting with a customer or after an operations team has completed a work shift. The AR should fall within the time allotted for the event. It should not appear as an add-on or extra work. An AR should be carried out when:

- Memory is fresh and unvarnished.
- Participants are still available.
- Learning can be applied immediately.

Generational Considerations

ARs are typically held face-to-face. However, if the work was performed by a virtual team, then the session should be held virtually. Baby boomers may not be as comfortable with this approach as team members from younger generations. This can provide an opportunity for a Gen Y or Xer to help prepare and coach their older team members in using an on-line approach for the session.

Another option that will appeal to the younger generations is to use Instant Messaging or a Chat Room to ask the AR questions and generate responses.

The AR Process:

The following four questions provide the framework for the AR discussion.

1. "What was supposed to happen?"

Everyone shares their own understanding of what should have happened. This is often the most revealing part of the process. Unless the event had a clear, unambiguous, and well-communicated purpose and plan, it is likely that different members of the team each had a different understanding of what was actually supposed to happen.

FACILITATOR SUGGESTION: Ask people to quickly write down their personal understanding of what was supposed to happen. Then, after a maximum of two minutes, ask them to read to the group what they wrote.

2. "What actually happened?"

Establish the facts about what actually happened (the ground truth). The ground truth is used to identify a problem, not a culprit. Save analysis and interpretation for the following two questions that focus on the facts.

Why were there differences?" and 4 "What can we learn and do different right now?"

Comparing the plan to what actually happened is when the real learning begins. Successes and shortfalls are identified and discussed. Agree to create action plans to sustain successes and help remedy shortfalls immediately.

FACILITATOR SUGGESTION: Ask people to quickly write down one key point they will take away from the meeting. Often, the act of writing it down helps participants focus on what is important and will help them retain what they learned for future event

How to conduct an AR

Open Climate

The key to successful ARs is open and frank discussion. The objective is to learn and fix the problem, not to blame. Accordingly, ARs are learning events, not critiques or evaluation events. This may require some demonstration by the leader of the team at the beginning of the discussion.

Facilitation

Most importantly, the facilitator of an AR must ensure that the meeting is open and blame is not brought into the process.

ARs are designed to reveal and address real issues and "learning's" surrounding a team event – what the U.S. Army calls "Ground Truth." Therefore, it is important that the facilitator guide the conversation to the real and sometimes unspoken issues.

The facilitator may be the team leader or an external observer. If external, he or she must be a respected practitioner in the processes of the event and should have been a close observer of the actual event as it unfolded.

Lastly, the facilitator should make sure the process is quick and simple – an effective AR can be carried out in 15 to 30 minutes.

Participation

For an AR to be a successful discussion, it is imperative that:

- Only those involved in the event participate.
- There are no spectators; everyone in attendance participates.
- Everyone is on an equal footing in the learning process – no hierarchy.

Recording

Use a flip chart (or virtual ‘whiteboard’) to record the team answers to each of the questions. Try to limit the amount of writing and content to one or two charts, which serves to keep the time for the session and the team focused on the one or 2 important areas for improvement and action.

Recording the key elements of an AR clarifies what happened and makes it possible to compare that to what was supposed to happen. It facilitates sharing learning and experiences within the team. It can also provide useful learning and insight for others in the organization performing similar tasks and projects, but that is not its primary purpose.

The key purpose for doing an AR is to help a team learn and quickly apply the learning in real time to improve their current performance.

This guide is based on the work of Kent Greenes (www.greenesconsulting.com) and the KM Team at British Petroleum from 1995 to 1999.