

Getting Your Leaders Ready for What's Next? Experience is the Best Teacher

Leah Houde, Executive Director, and Steve Mahaley, Global Practice Lead, Design Group, Duke Corporate Education

When was the last time you learned something that really made a lasting impression? Odds are, it relates back to a particular experience, situation or interaction that continues to shape your thinking. Maybe it was when someone took a chance on you, or you had to make that tough call under pressure. It could be the time when you said exactly the wrong thing to a stakeholder and a mess resulted. Experience is the best teacher and we humans are built to learn from our experiences.

As a CLO, Human Resources Director or top executive focused on learning within your organization, it is vital to instill this experiential component into your learning and development offerings to achieve your objectives. At Duke Corporate Education (Duke CE), we believe experiential learning is an integral part of preparing leaders for what's next. We have been designing, building and delivering such experiences for over 16 years. In this white paper, we share our perspective on experiential learning. Our hope is that you will find some things here to consider integrating, whether in your own internal program design work, or in working with external partners.

PREPARING FOR UNPREDICTABLE LEADERSHIP CHALLENGES: LEARNING TO WALK

Think about an infant child. He or she will learn to scoot, crawl and eventually walk through different forms of experimentation. Testing, sensing and getting feedback from the environment is the primary method for learning. From a child's perspective, there is great uncertainty in walking. There is unfamiliar territory; and standing upright and moving on her feet provides an unfamiliar perspective and requires new degrees of coordination. It can be quite scary. In actuality, there are many similarities between a child walking and the unpredictable terrains that leaders must navigate today.



American educational theorist David Kolb¹ outlined his experiential learning theory as a 4-step process:

1. First you have a concrete experience – you DO something.
2. Then, you pause to REFLECT on what just happened.
3. Next, you analyze or think about those reflections and DECIDE on some things that you might want to try differently next time.
4. Finally, you TRY out these approaches in a few situations to see what happens.

The theory is that effective learning occurs only when you take actual action and go through all four steps of the model. We agree. But sometimes giving leaders direct experience with situations that could result in this kind of real learning isn't safe or straight-forward– risk is high and time is short. So it is important to create alternative types of learning experiences for leaders outside of their everyday work. See more on the alternatives below.

IN THE BRAIN: THE ORIGINS OF AH-HA MOMENTS

Analyzing cases will only get you so far. It is quite easy to learn a case study in an academic setting and then return to the workplace and do things the same way they've always been done. Unfortunately, this happens a lot. Concepts covered in a classroom never get translated to real action at work. There is a completely different response, however, when you engage a leader in something active, where they don't just imagine what it would be like to apply concepts but are prompted to do something.

Maybe it is catching themselves in the act of using their same old ways of doing things, or trying out a new approach in a context that feels real and receiving meaningful feedback in the moment. That's when you have those "ah-ha" moments and hear about behaviors changing at the workplace.

But what is behind all of this? For a long time, we've had only anecdotal evidence that creating experiences was the most solid path to real learning. But now neuroscience has given us a window into how new neural pathways – meaning new brain patterns for thinking and doing – are formed. Through his research Dr. Srin Pillayⁱⁱ, a physician, neuroscientist and Duke CE educator, gives us real insight into how this works. Here are two:



Insight #1 – Create a safe space for trying new things.

Stress stymies learning. And new situations generate stress. So, just when we most need to try new things, our brains tend to resort to our old ways of doing things. Work to provide a trust-based learning environment, and give your leaders an approach and time for acknowledging stress levels, and reducing them to a productive level. This will allow freedom to form new neural pathways.

Insight #2 – Participants need to be active players, not passive observers.

When we actively engage in an activity, the pre-frontal cortex of the brain is engaged. This in turn manages emotions in the amygdala (the part of the brain where we first register fear and that controls our fight-flight reactions), and the memory of the

experience is laid down in the hippocampus, or the part of the brain associated with long-term memory. In a nutshell, this allows us to be more effective learners. Studies of the brain show that passive learning doesn't stimulate this virtuous cycle. So having people analyze a case or work through questions of what they would do in a situation helps. But it doesn't build new neural pathways as when playing an active, emotionally engaged role.

In conclusion, experiential learning sessions create a safe space for leaders to try new things. Yes, their egos may get a bit chafed, but they won't cause any damage to the business, so stress levels tend to remain lower. And by definition, participants are fully engaged, not just observing.

CONTEXT AS THE TEACHER

Context is key to experiential learning. As the world continues to become more complex, more uncertain, and less predictable, it has become apparent that being good at something in one situation doesn't mean that you'll be good at it in another. For example, consider the act of giving feedback. A leader skilled in using a very direct approach such as the "situation-behavior-impact" modelⁱⁱⁱ, will likely fare well in an American company. Put that same leader in Japan and that approach could backfire. Or consider the need many leaders have today to make decisions with limited or conflicting information, and under time pressure. Seeing a decision-making model and talking about it in table groups has limited value. Context matters. In an executive education setting, here are ways to use context in experiential learning activities:

1. **Connect the business context to learning outcomes.** Before putting any learning activity into a design, you need to start with your organization's business context. What is going on in your world today that leaders need to grapple with? And how do you need to approach that context differently to drive real success for your people, and for your customers? This needs to be your entry point throughout the process, and will be the source for clearly articulated learning outcomes. We then recommend integrating experiential learning when and where it makes sense. Identify the right moments in the flow of the learning journey where hands-on, immersive experiences in context can be employed to provide the learners those all-important opportunities to test, experiment, discover and practice new ways of thinking and behaving.
2. **Design the experiential context.** The experiential context is the situation, environment and storyline selected for the above learning outcomes, with all concomitant opportunities for leadership behaviors to be exercised (or



ignored!). The nature of the experiential context itself varies widely. We have found that some clients really need an environment and situation that is a true mirror of their current reality. Sometimes this requires a simulation environment where leaders are faced with situations that are common points of struggle for them during their day-to-day lives. In other cases, the experiential context may need to be metaphoric, taking the leaders completely out of their normal spheres in order to help them leave any default (and limiting) thinking behind. For others, the context needs to be outside of the classroom and in the local (real) market. In this case the market is the learning context. The common foundation to all of these is the selection or creation of a context in which leaders can test, experiment and learn from active engagement. They feel they are part of a story, they see themselves and the world around them in a new way, and have practiced key skills to make them successful.

- 3. Debrief to reflect and gain deep insight.** One common critique of traditional experiential learning activities is there is little or no relevance of the activity itself to any particular leadership skill development or insight. And in some cases, where there could be a good analogy or metaphor for leaders' reality, that opportunity is missed in the conducting of the synthesizing conversations

otherwise known as the debrief. The debrief should draw out from the participants the impact of the experience, their emotional states, points of struggle, decision-making process, consequences of their actions, and insight for application to their business context. In other words, it is critical to give participants a direct line of sight between what they just experienced and the real problems they are facing day to day. It is this connection back to the business context that takes learners through steps two and three of Kolb's learning cycle (reflecting on what happened and concluding what should be done differently next time). Without this, these activities will be engaging and might help to build the team, but they won't result in a shift of behavior that improves leadership and addresses core business issues.

WHAT THIS LOOKS LIKE IN ACTION

Let's look at a few concrete examples of experiential learning designs through two different approaches we regularly deploy.

1. *In-market immersions*

First, we use an approach called in-market immersion experiences where the market is used as the classroom. These experiences take the learners into real places with real people, and challenge them to see the newness of the context and discover opportunities therein.

Our first example comes from Africa. The phrase "live the values" is tossed around quite a bit, but one South African banking client truly wanted their participants to experience their value of "being relevant to the societies in which we live and work." To help participants deeply understand the value, Duke CE designed a day that immersed participants into the less advantaged, but highly-valuable demographic of the South African population.

Years of apartheid rule in SA created economic inequality among many citizens, which created clear "served" and "underserved" banking customers. To bring the underserved market to the forefront of leaders' minds, Duke CE created an in-market experience where teams of bankers worked with budding entrepreneurs in a suburb of Soweto. The bankers began to understand the needs of small business owners in this market, and in exchange, the bankers taught skills of running profitable businesses (such as pricing, cost control, increasing production, etc.). Both parties benefited in the short term as well as the long term.

The bankers learned that this demographic was a potentially profitable segment, and immediately began developing offerings to serve the needs of this emerging population.

In our second example, we focused on what it means to lead in today's world characterized by uncertainty, unfamiliarity, and unpredictability. One client needed a new mindset to equip their people and shape their approach to leadership as they navigate today's constantly changing world - to manage growth, and to create clarity and direction in this context. Working in partnership with the client, we created an approach to expose their leaders to a new way of seeing the world, and therefore a new way of navigating and responding, to initiate a mindset shift among their leaders. This was supported with the right tools and routines, which when made habit, ingrain this new mindset in a leader.

We could have approached these topics in a traditional classroom setting, but knowing that a visceral experience would be a far more powerful approach to shifting mindsets, we created an experience in which these leaders spent a day actually navigating an unfamiliar context. Using the city of Miami as our "classroom" and equipping the participants with a set of tools to explore shifts to the urban landscape of the city and uncover insights, these participants experienced adopting the mindset for a day that they need to adopt in their roles as leaders at their organization.

Through facilitated, on-going discussion these leaders have continued to apply the learning in their day-to-day work. As one participant recently noted, he has been using the experience not only to inform how he approaches the work he does, but how he approaches the way he manages and develops his people. He has used the tools to help his teams also navigate an unfamiliar environment, to execute their action plans with clarity despite the pace of change they face.

In these two examples, the local market context, whether Soweto or Miami, created a learning platform for the participants. The participants could not have seen this new possible market segment or the opportunities in Miami in any other way unless we had brought them there. The context itself was the teacher.

2. Metaphoric experiences

On the other end of the spectrum is what we call **Metaphoric Experiences™**. In some instances, putting learners into their own context doesn't work. This is particularly the case when experts need to re-examine their default thinking and leadership habits. Realistic experiences that attempt to replicate their worlds provide too many opportunities for them to notice incongruences; they get caught up in why their specific

context is different and therefore view the experience as irrelevant. In these situations, we look for contexts that are nowhere near their day-to-day situations but have analogous parallels.

As an example, a client needed to learn how to build relationships and trust with clients, who were often very different than themselves. How could participants deeply understand a person's needs and interests?

Duke CE thought about other professions that require learning about people, and formulated the "Art of Biography" experience. Enlisting the help of Pulitzer prize winning author Craig Wolf, who was researching and writing the biography of Willie Mays, Duke CE designed an experience around "getting to the story," to explore how a writer needs to understand his/her subject. For this experience, Duke CE contacted four former members of the Negro Baseball League who played with Willie Mays during the days of segregation.

In this experience, participants were taught techniques of biography writing aimed at "getting the true story" by the professional biographer, and then sent to interview the 70-85 year old baseball players. The first round of interviews was fairly superficial, mainly focused on statistics such as ERA, RBI, etc. A check in with the biographer encouraged the participants to dig deeper, to get to challenge personal biases, and to "get the real story." A second round of interviews revealed much more about the hopes, desires and interests of the players.

The experience was debriefed in a manner that linked the participant experience to their daily conversations with clients and employees. Participants left with a more open approach and more interest in getting under the surface to understand the real story and as such build that highly-elusive trust the professionals seeking new clients cultivate.

More and more often problems in organizations are being addressed by cross-functional teams that include several layers of leadership. In collegial cultures those teams often fail to make real, rapid progress – wasting time and energy in most cases and completely missing big opportunities in the worst cases.

In our second example, our client recognized that slow and ineffective decision making was putting a drag on both performance and engagement – especially in the middle of the organization. They claimed that their nice culture turned passive aggressive when decisions needed to be made – really smart people offering reflections, insights, and options, but not taking action.

To help shine a spotlight on the mindset and behaviors that drive that condition, we knew that we needed to put these leaders in a new context where their expertise didn't get in the way of the underlying reality of their leadership. Therefore, for a few hours these leaders donned white coats and stethoscopes and became Emergency Room doctors from across a range of sub-specialties – including radiology, pulmonology, and surgery. They had a sick patient whose condition was complicated and getting worse. Working with real doctors from Johns Hopkins Medical School, a long time Duke CE partner, each specialty team explored the basics of their domain and applied their new knowledge to diagnosing the patient. The broader team convened to discuss their observations and to compare plans. There was a difference of opinion – do we focus on the kidneys or the lungs? Do we stabilize for further evaluation or go right to surgery? Everyone had an opinion and no one had a clear solution. Committing to very preliminary action, the small mixed specialty teams gathered and shared their perspectives – each new team developing a plan for intervention. By the time those



teams reconvened, the patient's condition had worsened. Time was critical.

Teams presented their ideas – each offering a well thought-out and reasonable approach. A few groups offered ideas that were very similar. It seemed like there was a way to move forward. As they presented, the Attending Physician updated the group that a decision needed to be made. The group circled back around sharing their ideas. Before they could make a decision, the Attending Physician informed them that the patient had ultimately died.

The group exhibited classic behaviors that we see in groups of experts from different fields. David Kantor termed the phenomenon the Hall of Mirrors^{iv} – everyone has a good idea but no one takes responsibility for selecting the best ideas and advancing them to conclusion. While they had a challenge recognizing this in their day-to-day work, standing face-to-face with having a patient die, they were able to connect their behaviors to the outcomes here, and ultimately to results they were getting back at work.

By taking these participants completely out of their context, we level the playing field. No one is an expert. This also helps leaders drop their typical role-based behaviors and mindsets. The contexts are highly engaging and complex, and these story lines, roles and related experiences get participants “out of their heads” and behaving as curious beginners. The design is shaped so that the fundamental underlying approach to getting things done in the metaphoric context is analogous to the participants’ business context. Therefore, the debriefs become very rich with participants quickly moving through steps two and three of Kolb’s learning cycle (reflecting on what happened and concluding what should be done differently next time), and with the emotional tags from the new experiences helping them embed into long-term memory.

KEYS TO INCORPORATING EXPERIENTIAL LEARNING

From our perspective and experience, there are some additional key ingredients that create effective experiential learning:

1. Match the experience to business learning needs. It may seem obvious, but you must be able to draw a pedagogical line from the choice of the particular experience to the business and leadership issues you are trying to tackle.
2. Optimize for interaction. Design and arrange the experiences so that no one can hide. Everyone must have a role, and must actively engage. As noted above, it is through the active engagement in the experience that your leaders will derive maximum insight.
3. Academic rigor matters. Not only does it ensure the right experience for the right learning outcome, but the experiences themselves have internal validity. Theory and research drive focus and grounding of the experience and set up the question for us to investigate. Without the academic underpinning our rational brains can continue to pick apart the relevance of the experience and allow it to become simply a fun parlor game.

4. Details matter. Bring in the real experts – whether it is ethnographers to help us see and understand people more deeply, or interacting with medical doctors in the ICU experience – to get the context right and ensure that the journey is real for the participants. Craft the immersive elements, even if the experience happens within the walls of a ‘standard’ classroom or conference center hall. Visuals, sounds, sights and even smells and tastes should surround the participants in a context. This is what helps to get participants hooked into the story so they stop actively asking “what does this have to do with engineering?” and start suspending disbelief long enough to get kicked in the gut by a new experience.

When you combine all of these elements, you get something special. This level of engagement and processing does more than add knowledge; it has the power to shift patterns of thinking and change behavior. This approach enables leaders not only to learn, but also to change and adapt to new challenges – much like that child who, now as a walking toddler, has a completely new set of skills with which to explore, understand and master her environment. Experiential learning is now more than ever the key to helping leaders find a new way of seeing the world and their role in it and ultimately positioning their organizations to win.

*Duke CE would be very happy to discuss these ideas further with you. We have developed and conducted these kinds of experiences around the world.
Contact: Christine.Robers@dukece.com.*

¹Encyclopedia of the Sciences of Learning, Experiential Learning Theory, Kolb, Alice Y. and Kolb, David A.; Jan. 1, 2012

²Applying Brain Science to Business, Srini Pillay, MD, June 2015, *Dialogue*

³How to Get Feedback, K. Kirkland, S. Manoogian, Center for Creative Leadership, 1998

⁴Reading the Room: Group Dynamics for Coaches and Leaders, David Kantor, Jossey-Bass: 1 edition, May 2,2012