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**FS II 97-112**

**The Live Case: A Method for Stimulating  
Individual, Group, and Organizational Learning**

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## ***Abstract***

This paper describes experiences with an innovative method to stimulate individual, group and organizational learning in a management context. It highlights the demands placed on management development today and illustrates in detail how the live case workshop method can help meet these demands. The difficulties that individuals and groups can encounter during the process are discussed and the implications for the skills required of learning facilitators are explained. Furthermore, the need for new approaches to evaluating learning is outlined and a mix of methods that enables immediate as well as long term feedback on learning effects for the individuals, the group, and the organizations involved is proposed.

## ***Zusammenfassung***

Dieser Beitrag beschreibt Erfahrungen mit einer innovativen Methode zur Förderung des Individual-, Gruppen- und Organisationslernens, die den Bedürfnissen und Zwängen des heutigen Managements zu entsprechen versucht. Lernbarrieren, die sich bei einzelnen Teilnehmern, bzw. auf der Gruppenebene im Laufe des Prozesses ergeben können, werden ausführlich diskutiert und die daraus entstehenden Herausforderungen an die Lehrkräftequalifikation werden hervorgehoben. Desweiteren wird die Notwendigkeit der Entwicklung neuer Ansätze zur Auswertung von Lernerfahrungen thematisiert und ein Methodenmix, der Aufschluß über sowohl kurzfristige als auch längerfristige Lernerfolge des Einzelnen, der Gruppe und der Organisation ermöglicht, wird angeboten.



## Introduction

The need for a paradigm shift towards life-long learning has been eloquently and persuasively stated (e.g., Handy, 1989 and 1994), and the term has gained currency among practitioners in education and business (e.g., European Foundation for Management Development, 1996; Fischer, 1997; Pawlowsky & Bäumer 1996; Sattelberger, 1996a). Unless innovative approaches to learning at work are developed, however, the issue will have little more than rhetorical manifestations. Given the speed and scope of change in societies and economies, life-long learning must encompass more than techniques to refine people's technical skills; it must also enable people to make significant behavioral and cognitive shifts. In other words, both single- and double-loop learning skills are required for life-long learning: people need to learn to do some things better, and in addition they need to learn how to question what they have been doing so as to understand what to stop doing and what to do totally differently (Argyris & Schön, 1978).

This paper<sup>1</sup> focuses on life-long learning in the context of management. It first defines the key challenges, then presents a specific approach to meeting them, the live case workshop. The various phases of the workshop are described and illustrated with examples from experiences with managers from different countries. The implications for the kinds of skills the learning facilitators<sup>2</sup> need to have in order to support such an approach to learning are highlighted because they differ quite significantly from those expected in traditional teaching. Evaluation processes in this approach are also discussed.

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<sup>1</sup> This paper builds on and significantly expands ideas published in German in a Festschrift in honor of Professor Dr. Hans Merckens (Berthoin Antal, 1997).

<sup>2</sup> The choice of term to designate the "educators" who work with the participants through the live case workshop is fraught with difficulties. Ashridge Management College calls its professional staff "tutors", specifically avoiding the academic connotations of "professors" and their traditional roles as dispensers of knowledge through lecture format. Outside of Ashridge, the term "tutor" is not totally satisfactory for two reasons: the term "tutor" is not commonly used beyond the UK; and the term does not bring out the interactive and group dynamic dimensions of the role. The "educator" in the live case is expected to facilitate and support the learning of the participants, but the term "facilitator" tends to be limited to the role of process consultants and does not include a sufficient degree of expertise in the management theories and models which are required in the live cases. For lack of a better term, this paper uses the term "learning facilitator".

## **I. Learning in the context of management**

Considering the realities of managers' work (e.g., Kotter, 1990), the challenge of management development, whether in for-profit or not-for profit organizations, requires:

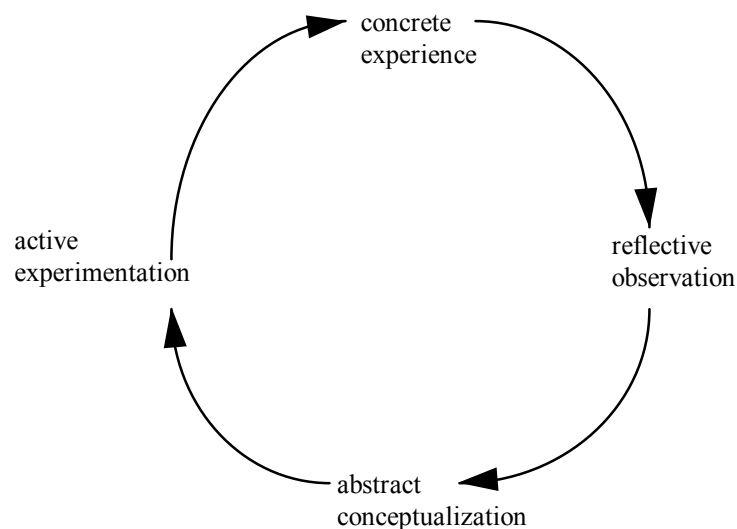
1. The elimination, to the greatest extent possible, of the traditional boundaries between "learning" and "working" (Revans, 1971; Casey, 1980).<sup>3</sup> The connection between what is learned and the working environment needs to be very clear, so that what has been learned can be integrated into the daily context.
2. A compression of the time required for learning. Managers are under very high time and performance pressures and report that they can rarely leave their responsibilities at work for more than a week at a time for development purposes (Handy, Holton & Wilson, 1996).
3. The recognition that learning must happen both at the individual and at the group level. The fulfillment of management responsibilities cannot be seen in isolation, but rather as the outcome of interactions with others (Quinn et al., 1996).
4. The integration of international skills. The increasing internationalization of markets means that managers must work in international and multifunctional teams (Snow et al., 1996; Schneider & Barsoux, 1997).
5. The development not only of new ideas and behaviors, but also of the ability to question and revise existing patterns of behavior and mental maps (Argyris, 1993). The cognitive and behavioral recipes that were useful for managing past challenges are often inappropriate for dealing with the new demands managers face in their work (Dierkes, 1992; Hedberg, 1981). This is particularly true when organizations are undergoing turbulence and when individuals are making major career transitions (e.g., the shift from operative responsibilities or middle management into upper management with broad and strategic responsibilities).

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<sup>3</sup> The apprenticeship system, especially as it is widely practiced in Germany, is an example of an educational approach that seeks to combine learning and work (see for example, Berthoin Antal, 1990). However, it is limited to the entry phase into the world of work and it is focused on transmitting to the young people who are entering an occupation the technical skills they will need and on socializing them into behaving according to existing norms. There is no attempt made to stimulate second order learning; they are not encouraged to challenge how or why things are done the way they are in organizations.

In the past few years a number of innovative approaches to management development have been introduced, many of which are more or less explicitly based on Kolb's learning cycle<sup>4</sup> (Kolb, 1984; Sattelberger 1996 provides a good overview). Kolb identified four phases in the learning process: concrete experience, abstract conceptualization, active experimentation, reflective observation (Kolb, 1984:42). He emphasized that all four are necessary in order for learning to take place (see Figure 1). His research, as well as studies by Honey and Mumford (1982) suggest that there are individual learning styles characterized by a preference for certain phases of the cycle and a disinclination to use the other phases.

Figure 1: Kolb's Learning Cycle



Based on David Kolb (1984): *Experiential Learning*. Englewood Cliffs: New Jersey, p. 42

Kolb found correlations between career orientations and learning styles. For example, he observed that engineers tend to prefer learning approaches based on abstract conceptualization, whereas social workers more frequently emphasize the usefulness of active experimentation (Kolb, 1984:127).

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<sup>4</sup> Kolb, in turn, based his work on Kurt Lewin's experiential learning model. See Kolb (1984:21).



Whichever they prefer to start with, however, it is essential that they consciously use the other approaches and complete the learning cycle, in order to succeed in mastering the range of demands placed on them by their work (Kolb, 1984:191). With regard to managers, research shows that on the whole they focus on action, both in the form of concrete experience and active experimentation, but they tend to skip or skim over reflection (Argyris, 1991; Berthoin Antal & Gonin, 1992:11; Senge, 1990).<sup>5</sup> This may be due not only to personal preferences but also to the pressure for action on them at work and the fragmentation of their time. A learning approach designed for managers therefore needs to take this predilection for action in mind by building on it as a strength and ensuring that the reflective dimensions are added to complete the learning cycle.

## **II. The Live Case Method**

Drawing on the tradition of action learning that was launched by Reg Revans (1971), Ashridge Management College has spearheaded the development of the live case method as an innovative approach to management development, with academic support from the Science Center Berlin (WZB). The live case method is an intensive and structured learning experience that covers the entire learning cycle several times in 4-5 days. In the spirit of the action learning tradition, the live case method assumes that managers learn most effectively with and from other managers through working together on actual, real-time problems. It differs from the “pure”<sup>6</sup> model of action learning in that the problem the participants work on is not their own, but one in another organization that is willing to host the live case for the group. As distinct from the traditional case method, in which the situation faced by an organization has been written up by experts in advance, with questions defined for teaching purposes and for which the manual suggests desirable answers, in the live case the participants enter into a host organization to collect their data in response to strategic questions posed by the senior

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<sup>5</sup> Cross-cultural comparisons of management styles (Laurent, 1983; Trompenaars 1993; Adler, 1997) suggest that differences can be expected in the relative preference for action and reflection-based learning depending on the country in which managers have been educated and socialized. For example, it is likely that French managers would have a stronger bias in favor of using abstract conceptualization than their Anglo-American counterparts would.

<sup>6</sup> For a discussion of other changes that have been made to the “pure” model of action learning and a review of the literature in this area, see Mumford, 1995.

management. The results of the participants' deliberations do not take the form of a classroom debate or a paper for the professor, but a presentation to the senior management of the host company.

The purpose of the live case is to create a situation in which the participants develop their ability to think and act strategically, individually and as a group. The use of a real strategic challenge in a host organization maximizes the reality dimension of the learning experience (as opposed to text book knowledge and classroom learning processes), thereby enhancing the relevance and transferability of the learning back to the participants' normal environment. The time constraints under which the participants work during the live case and the quality pressure created by the presentation to the host company management correspond to the kind of pressures characteristic of the managers' environment. At the same time, the "foreign" context of the host company allows the participants to see certain things more clearly than they would as insiders, because their perceptions are uncluttered by the filters of organizational culture and politics. Having learned to perceive these issues more clearly in the host organization, they can return to their own organizations with sharpened sight.<sup>7</sup>

The participants of a live case workshop can either come from different organizations or from different parts of a single organization. They are usually highly motivated middle managers who are preparing for a significant step in their career. As such, they are therefore open to learning from a challenging situation like the live case. A group size of 7 to 12 participants has proved effective to cover the depth and breadth of the task while also enabling sufficient intensity of interaction for productive peer feedback. In light of the strategic and therefore multidimensional nature of the questions at the heart of each live case, it is useful to have functionally mixed groups, so that multiple aspects can be considered. Internationally mixed groups of participants have been found to work very well in the live case format, the only limitation being that all the participants need to have a good enough knowledge of the language needed to conduct interviews in the host company.

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<sup>7</sup> The live case format thereby builds on the basic strategy of learning through comparison (Deutsch, 1987) and the use of "naive" perception so well illustrated by Alexis de Tocqueville that permits an outsider to have "a fresh view of the situation ... and not accept everything as given" (Berthoin Antal, 1987:510).

The live case experience in a host company is embedded in a workshop that starts with an introduction into selected theories and models related to the strategic questions posed by the host organization, and it closes with exercises designed to stimulate the transfer of insights back to the participants' organization(s). See Figure 2 for an overview of a typical schedule.

Figure 2: Typical schedule for Live Case Workshops

	Evening	Opening dinner
Day 1	Morning	Introductory session
	Afternoon	Short inputs and exercises on relevant management models
		Further work on management models, Exercises to apply models to own company Introduction to live case method Distribution of material on host company
Day 2	Evening	Individual and group work to learn about host company
	Morning	Further work on relevant management concepts
	Afternoon	Group work on interview questions for host company and preparation of first meeting with "client"
Day 3	Evening	First meeting with "client" to understand assignment and agree "contract"
		Debrief of process
	Morning/ Afternoon	Interviews in host company Interviews in host company
		Debrief of interview process
Day 4	Evening/ Night	Analysis of interviews Preparation of presentation to host company
	Morning	Presentation to host company
	Afternoon	Debrief of live case at content and process level Feedback session
Day 5	Evening	Informal event <sup>8</sup>
	Morning	Exercises to transfer learning back to organization Evaluation of workshop

The inputs provided in the workshop and the stimuli in the host company challenge the participants to be open to new ideas and information and test

<sup>8</sup> The work schedule during such a workshop is extremely demanding. Time to relax together is rare and valuable. At this point in the workshop an evening with an informal and even a creative dimension can be an enriching experience after the intense intellectual activity of the past days.

their previously held theories. The workshop setting also enables them to try out new behaviors because they are working with a new group of people. They are not restricted by the behavioral norms and patterns or role distributions that affect them in established relationships at work. Throughout the workshop, personal and group feedback processes play a significant role in supporting the learning process, by engaging the participants in reflecting on their skills, mindsets and behavior. In other words, the live case method stimulates both cognitive and behavioral learning, and it promotes individual as well as group level learning processes among the participants.

The live case workshop also contributes to organizational learning in the organization(s) from which the participants come. Recognizing that organizational learning occurs through individual learning, but is not an automatic result of such individual learning, the workshop design creates a specific focus on how the learning can be transferred back into the organization(s) to which the participants belong. The participants can contribute to organizational learning by expanding the range of potential behaviors that can be drawn on in the organization (Huber, 1991). In addition, probably the most immediate beneficiary from the opportunities for organizational learning is the host company, as is illustrated by the reasons given for their interest in participating in such an exercise (see Figure 3).<sup>9</sup>

Figure 3: Organizational Learning Opportunities for Host Companies

- Live case concentrates the attention of the company on a particular strategic issue
- Interview process itself “unfreezes” the organization, sets people thinking in the company and opens up discussion
- Questions posed by external managers are challenging, but less threatening than when they are posed by external consultants
- Final presentation provides opportunity for the range of views expressed in interviews to be legitimized in open discussion--breaks with taboos

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<sup>9</sup> It is, of course, important that the learning facilitators brief the client in the host organizations so that the most can be made of this learning opportunity, and expectations are not exaggerated. For example, the host can benefit from the participants’ interview questions and fresh insights, but should not expect a comprehensive solution to be generated by the managers in a day! Also the client should know that participants are likely to get some details wrong in their data collection and analysis, but this should not be used as an excuse to reject the ideas presented and thereby block the learning.

### **III. Running Live Case Workshops**

#### **A. Preparation**

Although over time a general schedule for structuring the workshops has emerged, such as that illustrated in Figure 2 above, every live case workshop has to be designed anew, because each group of participants is different and each situation in a host company has some unique dimensions. The learning facilitators must know enough about the learning needs of the participants<sup>10</sup> and the situation of the organization(s) in which they are based to find a host organization that offers a relevant case and is acceptable in terms of competitive relationships.

The preliminary identification of the strategic questions for the live case is done by a senior manager in the host company, ideally by the person who is the “client” for the project, with the learning facilitators. The questions need to be broad enough to require the participants to consider a range of different strategic dimensions in the business context, without being so broad as to make it impossible to treat them more than very superficially. The task formulated by the host company needs to be tough enough to challenge the participants, but still manageable in scope. Probably the most important characteristic of the task is that it be recognized by the host organization and the participants as real and serious concerns for the organization. This not only spurs the participants on to taking the task seriously (rather than thinking this is a playful exercise or ‘make work’ activity); it also allows the members of the organization who are interviewed to see that their time is well invested. Sample questions from selected live cases are summarized in Figure 4.

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<sup>10</sup> Recognizing that management development needs are better met when business schools understand the organization, some companies are investing in building long term relationships with business schools (e.g., Lange, 1995). In the context of the live case workshop, when it is run for participants from one organization this spirit of partnership can also mean that one of the learning facilitators is a human resource manager from that organization.

Figure 4: Sample strategic questions for live case

- A company in the financial services sector that has grown extremely rapidly in a market niche
  - a) Is the company capable of maintaining highest quality standards in its current business activities with its existing management and organizational structure?
  - b) Is the company capable of developing into new business areas while maintaining its current activities?
  - c) How can the company ensure a positive culture and employee motivation in the face of the downsizing that will have to be implemented in 2 years' time? And how can it be sure to keep the best employees on board to take on the new challenges?
- A company that wants to grow in new markets
  - a) What does the new targeted market require?
  - b) How well prepared are we to meet these requirements with our current capabilities, particularly in comparison with our competitors?
  - c) What can we do to improve our competitiveness?
- A company facing shrinking market segment in one of its areas of activity in the leisure industry
  - a) Is this market segment declining throughout the industry?
  - b) Is it possible that this market segment could undergo a renewal that could allow us to become a dominant player in a niche market?
  - c) How should our company behave under such conditions?

On the basis of the preliminary formulation of the strategic questions by the host company, the learning facilitators decide what kind of theoretical inputs are likely to be useful to the participants. The purpose of these inputs is to provide the participants with theoretical concepts and models which they can use to explore and interpret the situation in the live case.<sup>11</sup> These concepts and models are, of course, intended to be useful to the participants within their own company as well, so exercises during the workshop focus on stimulating the participants to apply the ideas first to their own organizations,

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<sup>11</sup> The participants may choose to come back to these models later and use them to structure parts of their presentation to the client, but this is not a requirement in the sense that it might be in a business school course.

before moving on to the live case. These exercises are designed in the spirit of encouraging the participants to try out new ways of looking at situations, rather than to apply the models mechanistically. Furthermore, the intention is to create opportunities for the participants to explore and challenge their implicit assumptions in order to see whether they are relevant and applicable for the current context.

## B. Introducing the participants to the live case

After the participants have been introduced to the relevant models and concepts, and have had an opportunity to work together for a day or so, the live case approach is presented and information about the host organization is provided. This includes the preliminary strategic questions formulated by the client and written background materials (e.g., brochures, annual reports, articles from the business press, organization charts, financial data, strategic plans).<sup>12</sup> The first task the participants need to do is to prepare for the meeting with the “client” from the host company. Within a few hours they have to analyze the material they have received and any additional information they can obtain about the organization, its sector, and markets by other means (e.g., data banks, internet). On the basis of this information, they then have to decide what more they need to know from the client before taking on the task, and how they will ask the questions.

This is a turning point in the group learning process. Whereas during the first phase of the workshop the learning facilitators are “in the driver’s seat”, when the group starts work on the live case itself, the responsibility for managing the process shifts to the participants. In keeping with the tradition of action learning (Maunder, 1988), the learning facilitators, who until this point have provided inputs and instructions, move to the sidelines to become observers, coaches, and feedback-givers. They may decide to intervene in a process more actively if the group becomes stuck and needs help to work through a problem. During the first few hours of the work on the live case participants still tend to look to the learning facilitators for a signal on what to do next, and some even resent the sudden lack of guidance. Over the course of the next days, however, the participants learn to become a self-managed team. A striking phenomenon is the relatively fluid movement of several

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<sup>12</sup> Since the participants and the learning facilitators become privy to sensitive strategic information during the live case, many companies require that confidentiality agreements be signed by each individual at the outset.

participants in and out of leadership roles during different phases of the work: the group learns to work without a single designated leader but does support shared leadership (Sadler, 1997). For most this is the first time they have experienced such a situation, and when they look back on it they tend to be amazed at how much can be achieved this way.

The process of becoming a self-managed team is not easy, however, particularly since the membership is usually very diverse. Since the participants come from different functions, organizational contexts, and cultural backgrounds, they do not interpret the available information in the same way, and they tend to consider different kinds of information as crucial for their understanding of the situation. This means that an enormous range and number of questions is generated in the group. It is important at this stage that the participants recognize that they are bringing their own assumptions to bear on the situation. They often need to be encouraged by the learning facilitators to be explicit about these assumptions and formulate their hypotheses so that they can be shared and discussed with the group. When the participants understand each other's logics and motivations for posing certain questions, they are in a better position to come to a consensus about the key questions that as a group they want to clarify with the client.

The intensity of the task of coming to a consensus in a diverse group can have an undesirable effect that needs to be managed carefully: the growth in cohesion in a group during its formative stage is accompanied by an exclusionary dynamic. In other words, the clarification of a group identity, a sense of belonging and of inclusion, goes hand in hand with a definition of who does not belong, who is excluded (Buhr, 1997). The two most frequent objects of the exclusion dynamic are the learning facilitators or the client they are about to meet. Not infrequently, groups develop a critical or negative attitude to the client before meeting him or her. This quite common group dynamic is further heightened in the live case by the anxiety the participants feel when they are about to cross the threshold from workshop format into the real world of an organization that expects them to add value. The anxiety can take the form of aggression towards the client. For example, the participants may express anger and disgust with the "stupid" or "impossible" questions the client has posed, and they might formulate harsh judgments about the "arrogant" and/or "bad" management style they assume the client must have. When this happens in the preparatory meeting, the learning facilitators need to



make the participants aware of what is happening to them, and of the danger they run of communicating such feelings to the client in the first meeting.

Among the items that groups need to discuss with their client at the first meeting, independent of the substantial focus of the task, are: Why are these strategic questions being posed, and why they are being posed at this particular point in time? What other initiatives or interventions have been tried in the organization to deal with these issues, (including recent experiences with external consultants that could affect the interviewees responses)? Once the group has a more complete picture it can agree the task with the client. The initial strategic questions posed by the client are often too broad and need to be negotiated to a more manageable size by the group. The agreement on the final formulation of a clear and feasible task is the first professional outcome of the group's work with the client in the live case.

Thus, from the beginning, team working skills are essential, and the participants need to be supported by the learning facilitators to be conscious of the process dimension of their work. This is not something most managers are comfortable with--their task and action orientation tends to take over. Particularly when managers are under time pressure, attention to process and team dynamics is often seen as "fluff" or a luxury that the group can only afford after it has gotten the work done. The first big pressure point in the live case workshop is when the group is preparing for the first meeting with the client. The participants know that they need to make good use of the meeting so that they are well prepared for the assignment, and they feel that they need to make a professional impression on the client whose organization they are about to enter. They are therefore in the typical situation of risking overlooking team process by focusing only on deciding which questions to pose to the client. The costs of *not* attending to the team process dimension from the outset in a group's life cycle become visible later in its work (Adler, 1997:137-145; Canney Davison, 1994). In order to reduce the risk that dysfunctional group dynamics will derail the live case, and to develop the participants' ability to identify and talk about the behaviors that supported or impeded the group's ability to work effectively, review sessions are scheduled throughout the workshop. The first such sessions are usually led by the learning facilitators, but as the group matures, participants sometimes take the initiative and lead the discussion themselves. The purpose is to help each participant learn how to reflect on his or her behavior and its impact, as well

as to recognize the dynamics of situations in which the group got stuck in unproductive discussion or activity.

### C. Data collection in the host company

After their first meeting with the client, the participants can finalize their preparations for collecting data in the field. The senior manager responsible for coordinating the project (the client or a close associate) will have arranged for a series of parallel interviews for the group.<sup>13</sup> The interviewees can include people from different parts and levels of the organization, as well as clients, suppliers, shareholders, and non-executive board members. Depending on the strategic questions, the views of other stakeholders, such as members of the local community, may also be important. Companies with international operations may arrange for telephone interviews so that the perspectives of people in different locations can be brought to bear on the issue. Most interviews are conducted with one individual, but small groups can also be interviewed. The advantage of small groups is that they can be used as an opportunity to explore and compare different and sometimes conflicting views held by different members of the group (Buhr, 1997:102-103). Experience shows that clients who have a serious interest in the project compose very good interview lists, however participants can also ask for additional interviews to be arranged if they discover gaps that they feel need to be filled.

The next task is for the group to prepare the interviews. Which questions will they ask and how will they ask them in order to generate relevant and comparable data for their project? At first so many questions seem to be important and interesting! In the course of their discussions about the wide range of potential questions and question forms the participants need to learn how to focus on what is essential. Firstly, this is a core competence for strategic thinking and behavior. Secondly, it requires a willingness on the part of each participant to enter into the logic of the other members of the group, to respect and seek to understand their perspectives, and build a bridge to their own ways of seeing things. The costs of unproductive group work at this stage are high: If the participants cannot agree on a shared instrument of manageable length, or if certain participants do not have high ownership of

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<sup>13</sup> Depending on the size of the group, the participants can be organized into 4-5 pairs of interviewers. Since they are working in parallel streams this means that a group can conduct a total of 16-20 one-hour interviews in the course of a day.

the questions the group has finalized, the interviews will not produce a sufficiently solid, comparable data set for analysis. Experience suggests that an instrument with a maximum of 15 open and closed questions is manageable in an hour long interview and still allows the participants to pose additional questions, depending on the specific situation with each interviewee.

The interviews are usually conducted on the third day of the workshop. In preparation, the participants are given a concentrated input on basic skills in qualitative interviewing.<sup>14</sup> They also need to be made aware of their own subjectivity and its potential for selectivity in their reception of responses during the interviews. Particular emphasis is therefore placed on the importance of listening carefully and non-judgmentally, taking precise notes, probing for specific examples to get beyond generalities and espoused theories, and summarizing to check for understanding. The quality of the data is also maximized by having the participants conduct the interviews in pairs, so that they can share responsibilities for posing questions, taking notes and probing.

It is a new experience for most participants to agree on and keep to their roles during the interview: they need to learn how to work in partnerships. A trap some managers fall into in their first interviews is to forget their partner, run with their preferred questions, and seek confirmation of their own assumptions rather than discover new information. As a result, they overlook opportunities to probe for information and irritate the partner who has been marginalized during the interview.

Well-functioning pairs maintain frequent eye contact with one another, keep track of the time, cover all the questions and take advantage of opportunities to follow leads that emerge in the interview. They also take a few minutes before the next interview to compare notes on their impressions from the

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<sup>14</sup>At this point in the workshop managers with a human resource background often assume that they already have the necessary interviewing skills, so they can find it a difficult challenge to set aside the interview techniques which focus on assessing a person. For the purposes of the live case they need to learn to listen for the content and the business issues rather than the qualities of the individual they are interviewing. This skill is not only relevant for them in the context of the live case, however; it is becoming more important for human resource managers as their role shifts away from personnel administration to greater strategic involvement in business and internal consulting to the line.

interview, their sense of how they have done as a team, and to decide on any changes that need to be made. A learning facilitator is usually present in each interview as an observer, both in order to be able to give feedback to the participants on the process and in order to get a feeling for the data that is collected. A useful source of feedback is also the person who was interviewed: interviewees, knowing that the live case is both a learning instrument for the participants and a means of generating useful insights for their own company, are often happy to comment on where they felt that the interview went well and where they felt that the interviewers could have achieved more.<sup>15</sup> Interviewees tend to be particularly critical of situations in which the interviewers either seemed to have formed their own opinions in advance, or in which the interviewers were “too polite” and did not push hard enough for further information below the surface. It is a striking learning experience for managers to see how quickly these weaknesses in their knowledge acquisition skills are pinpointed.

#### D. Analyzing the Mountain of Information

After conducting 16-20 interviews in the host company, the participants are faced with the challenge of sifting through and making sense of a mountain of data. An immediate learning impact the interviewing experience has on participants is the amount of information it is possible to obtain about an organization in less than a day, if only one asks good questions and really listens to the responses.

Before they settle down to the job of analyzing the data, it is important for the participants to deal with the emotional responses that their interviews have generated. The emotions they feel stem from different aspects of the interview situation. Firstly, the interviewees communicate their feelings during the interview: they often speak very openly about things they are proud of as well as those they are concerned, frustrated, or even angry about in the organization. An emotional trap that participants can fall into is to respond to the insights they have gained into the problems in the organization revealed by the interviews with a feeling of distaste and superiority (e.g., along the lines of “what a stupid set of managers--it is obvious why the

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<sup>15</sup> Either the participants themselves or the learning facilitator accompanying the pair can ask the interviewee for his or her comments on how the interview went and what recommendations might be useful for future interviews.

company is having difficulties”). If the participants cannot move beyond this level of response, they will not be able to communicate useful feedback to their client, and they will probably not be able to take much valuable learning out of the exercise. Secondly, the participants may feel admiration, sympathy, or antipathy towards the person they interview, for example as a result of opinions that person expresses or of the way the person behaves in the interview. The participants need to acknowledge their emotional responses and consider how these feelings might affect their perception and analysis of the data. For example, data from an enjoyable or exciting interview partner risks receiving more attention and weight than that from a person who was experienced as boring or irritating. Thirdly, the very amount of information generated by the interview process generates strong emotional responses in many participants, ranging from excitement to confusion, particularly when there appear to be contradictory results.

The call for a brief period of individual reflection to allow each participant to acknowledge his or her feelings and to think about how to deal with them so as to avoid biasing the data analysis tends to take many participants by surprise. This step is at first seen by such participants as a detour, due to their task and action orientation and their assumption that data are objective and therefore supposed to be outside the realm of subjectivity and emotions. So, engaging in a reflection on emotional responses can require overcoming a certain resistance, but most participants who either accept the reasons given by the learning facilitators or at least suspend judgment, discover that once they start exploring this avenue, they have a lot to note down.

The next step is for the group to decide how it will structure its work to pool together and analyze the data in order to know what messages they will communicate in their presentation the next day. Some groups think ahead to this step before they go out into the field to conduct the interviews and decide on categories and techniques for compiling the key messages from the interviews (e.g., set up flip chart sheets with headings under which each interview pair will bring their results). The group needs to generate an overview of what each pair believes it has learned of relevance to the strategic questions posed by the client in such a way as to enable commonalities to be drawn out and contradictions to be resolved. Since the presentation is usually held on the following morning, there is severe time pressure to complete the task. In order to use the time efficiently, the participants can alternate

between working in plenary, in pairs, and in small groups. Participants who have developed a solid shared sense of purpose find it quite easy to organize themselves in ways that allow several tasks to be conducted in parallel. Problems appear in situations when participants have not developed sufficient common understanding and trust in each other: in these cases the group tends either to try to do everything in plenary, or to break into competing subgroups. At some point in their work, if necessary after some prompting by the learning facilitators, some or all members of these groups usually recognize that they will not achieve a professional result in time if they do not find a new approach to working together.

The data analysis should lead to a solid and shared interpretation of the interview results. The participants must be willing to let go of their initial impressions and preliminary conclusions in the face of contradictory information from other interviews. And they must be able to back up their views with good examples out of their interviews. It is the responsibility of each participant to challenge an opinion he or she does not feel is borne out by the data. There is a built-in pressure for high quality work because the participants know that their presentation will be attended not only by the client, but often by the entire top management team and many of the interviewees. These people are likely to pose difficult questions if they do not understand or agree with the observations and conclusions of the participants, so the group knows they have an interest in being well prepared in order to avoid embarrassment. The very fact that time itself is considered so valuable in management also creates pressure for the participants to deliver a professional result that adds value to the host organization in return for the time invested in the live case.

If the participants tend to shy away from challenging each other's conclusions, the learning facilitator needs to pose tough questions that reveal weaknesses in the logic or push the group to looking below the surface of generalities. This can happen if the group has not developed an ability to deal with differences of opinion, or when the participants are simply tired and hoping to finish quickly so that they can go to bed.

These sessions tend to last until very late, sometimes until the early morning hours. Participants are often surprised by how much time it takes to become absolutely clear about what they want to say to the host. Finalizing clear, well

supported messages and ensuring that the overhead materials for the presentation requires stamina and an eye for quality until the very end.

#### E. Presentation of the Results

Once the interviews have been analyzed and key conclusions agreed, the participants have two difficult decisions to make: a) Who will make the presentation? and b) How will they deal with sensitive messages? The need to decide on who will present the group's results creates a new situation for the group because by this time the participants have learned to work as a self-managed group without a designated leader and they now have to select someone from their midst to stand in front and address the client in their name. The participants need to weigh the different abilities of each member and also consider how the client might respond to the potential presenter. Groups often resolve this issue by selecting several people to share the presentation. Well functioning groups succeed in keeping individual performance motives in check and having the choice of presenters be based on their sense of how best to communicate the messages to the client.

The second decision is no less difficult. The interviews often generate sensitive information about how individual managers, including the client, are perceived to be performing. After having reviewed all the evidence in the interviews to ensure that the message is well-grounded, and not just based on a couple of frustrated comments, the participants have to decide whether to communicate or withhold such information; and if they decide to include it in the feedback to the client, how best to handle it. There is a danger that an arrogant feedback style is chosen, under the guise of directness and honesty, without consideration for the ability of the people involved to receive and use the information.

Equally dangerous is the situation in which the participants do not dare to bring up difficult messages, under the guise of not wanting to hurt someone's feelings. The attitude of the participants towards the client and the host organization is crucial to the communication. The key to resolving the dilemma is in the ability of the group to approach the host company with respect and empathy. When the participants see the recipients of their messages as essentially competent and willing to learn, the twin dangers of arrogance and cowardice can be circumvented.

A solution chosen by many groups is to distinguish between messages that are presented formally to the audience from the host company, and messages that are communicated personally to whomever is concerned. The decision as to who will convey these personal messages is also taken by the group, based on their sense of who is most likely to do it in the style fitting the person in question.

The presentation therefore usually consists of three parts: the formal presentation by the designated presenters, using overheads prepared by the group, lasting about 30-45 minutes; the comments and discussion session with the client and the other representatives from the host company, lasting about 30-40 minutes; and lastly the informal discussions, often linked with a buffet-style lunch that allows all the participants to move around and talk with each other, thereby creating opportunities for the delicate messages to be communicated as agreed.

#### F. Transferring the Learning

After the excitement of the presentation to the host company and the discussion with the client and the other managers, the participants still have to face the most important learning step of the live case workshop. They must distill the relevant insights from the intense experience that they can take back to their own organization. This step is critical to anchoring the learning from the workshop for the individual participants so that they see where to apply it beyond the workshop. Furthermore, this is the turning point at which they can explore how to use their individual learning to contribute to organizational learning. It is important that in preparation for this step, the participants have been reminded throughout the workshop that, as engrossing as the live case itself is, it is conducted as a tool for transferable learning, not a workshop for its own sake.

By this point in the workshop, the participants will have gone through the Kolb learning cycle several times. The experience they have accumulated in reflecting and talking together are valuable for this stage. The learning transfer process takes up dimensions of the Kolb learning cycle again: the participants reflect on their experiences to draw out concepts that can be applied to a different setting, and they formulate concrete action plans with which they can work and experiment in order to regain new concrete experiences in their normal setting.



In order to enable the participants to learn from their behavior during the workshop, time is needed for feedback in pairs and small groups. To help focus the feedback, a short set of competencies can be used for all the participants (depending on the kinds of competencies the workshop was designed to develop) or the feedback can be based on individualized learning goals. It is striking how curious most participants are to hear how they were perceived during the workshop and how eager they are for feedback from as many sources as possible. In groups that have communicated well during their work, the feedback sessions tend to be very open, direct, and constructive. Although there is a tendency to expect particular value added from the comments of the learning facilitators, in fact there is often little for them to add when the participants have exhibited curiosity in listening and directness in speaking with each other. The insight managers can thereby gain through this session about the value of feedback from peers is a very powerful instrument to support ongoing learning at work. Having experienced the richness of the comments their colleagues are capable of providing when asked for such feedback shows the participants that, if they wish to, they can continue learning with their peers, independently of workshops and expert facilitators.

In addition to stimulating the participants to learn about their individual competencies, the reflection sessions need to be structured to enable the participants to explore how their experiences in the live case workshop can be used to promote organizational learning. This is most effectively done in two steps. On the basis of a set of guiding questions (see examples in Figure 5), the participants first think individually, then move into plenary discussion.

Figure 5: Sample reflection questions for transferring the learning

1. What particularly struck you in Company X that could be relevant for you in your company? What will you do about it?
2. How could you apply some of the concepts used in the introductory days in Ashridge or in the live case back to your work in your company?
3. If you were to initiate a similar live case in your department, which key questions would you pose?
4. How open do you think you and your colleagues would be to receiving key findings from such a study?

It is striking how strong the immediate impulse of most participants<sup>16</sup> is to jump straight into discussing questions, rather than first taking a few minutes to thinking through them quietly and independently. Once the managers do overcome this temptation and actually engage in individual reflection, however, they can usually be observed to use the time well to think and take notes for themselves. The voicing of the ideas and action steps after the individual reflection is an integral part of the learning process. For example, the discovery that some peers had very similar ideas, generated independently, serves to confirm to some that their ideas are worth pursuing and they will not be alone in their endeavors in the organization. And when participants hear of ideas from their colleagues that they had not yet considered, they are stimulated to keep exploring new possibilities. The discussion therefore fulfills functions of cross-fertilization as well as legitimization of ideas to be taken back to the organization for action. Depending on the energy levels, it can be useful to consider what might block the transfer of learning, and explore how such hurdles might be handled. Realistically, however, by this point in the workshop, the participants are exhausted. The limits of what can be learned at the workshop have been reached and further goals are better achieved by arranging for additional learning support mechanisms at the workplace, such as focus groups and coaching.

#### **IV. Implications for Educators/Learning Facilitators**

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<sup>16</sup> This observation may be biased by the predominance of Anglo-Saxon and German participants in live case workshops conducted to date. Groups with a higher proportion of managers from Japan or Finland, for example, might well take more easily to the individual reflection period before sharing ideas with others.

Conducting the live case workshop requires manifold and, for traditional educators, quite unconventional skills. The task that comes closest to the traditional role of an educator is the presentation of selected theoretical models and concepts in the first phase of the workshop. However, to do this appropriately for the managers requires a different way of communicating ideas than is common in a university setting. The presentation of theories, models, and research results in the live case setting is not an easy task for educators who have learned to orient their communication style to university-based norms and time frames. Academics are also unaccustomed to providing a pragmatic introduction to conducting and analyzing qualitative interviews, since these techniques are usually taught over the course of one or two semesters.

What is it about the participants of live case workshops that differs from the usual target group academics deal with? Managers come to such a workshop with a broad range of different theoretical backgrounds and expectations. Some have already completed an MBA, many are regular readers of journals such as the *HARVARD BUSINESS REVIEW* and therefore well informed about new management ideas; still others know little about current management theories and concepts. All have in common a skeptical stance to academic theorizing and want to test theoretical constructs against their own practical experiences. The time pressures that managers experience in their work spill over into the workshop context as well, so they have little patience with long abstract lectures if they cannot see the connection to their daily reality.

The implications for the learning facilitators, therefore, is that they will have a greater impact in terms of credibility and relevance with this target group if they develop short, concentrated inputs around which exercises are designed to allow the participants to test the ideas actively than if they use the traditional techniques for communicating credibility and professionalism in academia: thorough lectures with extensive references to the literature. Academics who have already in some way participated in consulting processes in organizations tend to find it easier to adjust their communication to fit the workshop style.

Another requirement for the learning facilitators that differs from the traditional expectations is that they need to have good contacts to companies

and other organizations outside the university. Without this, it is very difficult to find a host company for the live case. Equally important are strategic thinking and negotiation skills, since the learning facilitators are the first interface with the host company and help prepare the preliminary strategic questions for the live case. Educators who have little to do with people outside the academic community will find it difficult both to identify potential hosts and to communicate effectively with them. This implies that more attention needs to be paid to building relationships between academics in different kinds of educational institutions and managers in business and other organizations. Such network-building cannot be done on an ad-hoc basis; it must be taken on as an investment, a long term strategy. Currently dominant role expectations and reward structures in educational institutions either neglect this or impede such an investment, so organizational changes will be needed if members of educational institutions are expected to take on these responsibilities.

Yet another dimension of the learning facilitator role not usually expected in educational institutions is interpersonal sensitivity, both in one-on-one relationships and in the context of group dynamics. The learning facilitator role includes the ability to coach and give feedback to individuals and groups, which requires the ability to sense where they are, where they need to go, and what could be stopping them from getting there. With the increasing internationalization of organizations, the participants with whom a learning facilitator needs to work are also coming from more varied cultural backgrounds. To date, very few educational institutions have invested in developing their professional staff to be cross-culturally skilled learning facilitators.

Possibly the most surprising and also difficult adjustment for the traditional educator to make in working in a live case workshop is the shift from the “lone scholar” mode to working in a learning partnership. Whereas in the traditional educational setting, a professor is responsible for developing and delivering a course alone, the live case requires close teamwork between the learning facilitators. Depending on the size of the group, 2-3 learning facilitators are needed to run the workshop. The partnership takes several forms: while one is presenting, for example, the others listen and observe to see how effectively the messages are coming across and how well the group is working with the ideas; during the interview phase the learning facilitators

work in parallel and each of them accompanies a set of participants; similarly, while the participants work in subgroups, the learning facilitators distribute themselves among the groups to observe or at time to facilitate the discussion; during the plenary group working sessions the learning facilitators observe the progress of the group and decide when one of them needs to intervene in the process.

The learning facilitators cannot afford to send conflicting messages to the participants that would add confusion to the situation. The complexity of the live case workshop leaves no space for competition between prima donnas in the learning facilitator role. On the contrary, the learning facilitators are responsible for modeling effective teamwork together. This includes dealing with conflict and resistance from participants, since there are moments in the process when interventions are needed to get the group to maintain high quality standards or to deal with a problem in the group dynamics. In such cases, the learning facilitators must be seen by the participants as being consistent and coherent in their teamwork; otherwise they risk being split.

For most members of educational institutions, this is a novel experience, since not only is close collaboration rarely required--it is generally impeded by existing reward structures that emphasize clearly identifiable individual performance. Here again, organizational changes will be needed to enable more cooperative skills to be developed and rewarded.

## **V. Evaluation and the Live Case Approach**

Evaluation is a sore topic in management development, for although there is increasing pressure to measure the return on investment, it is not clear how to measure learning (Garvin, 1993). There is a gradually emerging awareness that the course evaluation forms traditionally used in organizations (companies as well as business schools) provide information only on the participants' satisfaction with the performance of the professors (along with the infrastructure around the course, including the food and sleeping accommodations). Such evaluation sheets provide no insight into the actual learning effect of the course. Worse, they put the participant in the position of a demanding consumer rather than reinforcing the message that he or she is responsible for learning. And they signal to professors that they should hone

their performance and impression management skills rather than their ability to facilitate learning.

The timing of evaluation is also an issue. When the only point at which the learning effect of the workshop is evaluated is the end of the workshop, the usefulness of the feedback is quite limited. By contrast, if periodic checks are conducted during the workshop on how learning is progressing there is the opportunity to make adjustments en route in order to improve the learning experience. Furthermore, evaluations conducted after the participants have returned to their working environment can explore the extent to which the experiences at the course had a lasting impact, the extent to which the individual has been able to transfer his or her learning into the organization.

Dissatisfaction with the traditional “happy sheet” course evaluation method has prompted experimentation with the format and the timing of evaluation processes in the live case workshop, and a mix of approaches is emerging. First, the frequent (scheduled and spontaneous) reflection periods throughout the workshop allow the participants and the learning facilitators to make changes in the way they are working. Second, the client in the host company provides feedback to the group after the presentation, giving the participants a sense for how the quality of their work has been perceived and sometimes providing insights into where improvements were needed in analysis or delivery. Third, on the last day the participants provide feedback to each other, based on their experiences in working together. Fourth in the sessions after the participants have made their presentation to the client, they shift back to looking at the learning that is relevant for them in their own organization and work out action plans for changes they can initiate, thereby not only continuing to practice their own learning but also embedding it in organizational learning. A fifth step, currently underway, is to follow up with former participants to explore how they see the long term learning effects of their participation in the live case. The participants of live case workshops held in Ashridge over the past 3 years are being asked to respond to several questions, including what they believe was the most important thing they took away from the workshop. The hosts of the live cases are also being contacted, so that the impact that the experience had on their organizations can be explored as well. The results of these post-experience evaluations will be used to reflect on how to continue to improve the live case workshop and how to provide support to maintain learning beyond the workshop event itself.

## **VI. Conclusion**

The live case workshop offers a rich learning experience for the participants and for the organizations involved. Its design and content meet the conditions identified at the outset of this paper for management development: the greatest possible elimination of the distinction between “learning” and “working”, the compression into a few days; the combination of individual and group learning; the exposure to new ideas and the challenging of previously held assumptions and behaviors. In the course of the workshop, the learning cycle is completed several times, so the participants experience what it means to avoid the trap of interrupting the cycle. They have concrete experiences in planning and conducting their intervention in the live case; they are frequently stimulated to observe what is happening and to reflect on these experiences and to draw out insights from them that they can then use to experiment with, try out in concrete situations, which then become the object of renewed observation and reflection.

Every participant leaves the workshop with his or her own learning points. The learning facilitators do, too. Among the most significant lessons that emerge time and again are that the skills of posing good questions and really listening to the answers with a sense of curiosity and empathy are very powerful learning tools; and that there is an enormous potential for learning and achieving goals in self-managed teams with a diverse membership--as exhausting and as trying as the process of making this potential come alive can be! It is through experiences such as these that new, creative and stimulating forms of organization leave the realm text books and visionary rhetoric and become a reality.

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