The Fifth Discipline: The art and practice of the learning organisation

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General Ideas

- To learn you need to develop 3 capabilites:
  Fostering aspiration, developing reflective conversation and understanding complexity

- Thinking of the world as divided in unrelated parts is bad.
  Keep the larger whole in mind
- The most fundamental task of a leader is to enable people to have the most enriching lives they can

- We must look beyond individual mistakes an bad luck to understand important problems
- The problem is not too little information. It is too much, desciding what is imortant and how to act on it
- In a learning organization leaders are designers, teachers and stewards
- The hallmark of good design is the absence of crisis

- A mistake is an event, the full benefit of wich has not yet been turned to your advantage
- People don't resist change. They resist being changed
  You cannot change how someone thinks, but you can give them a tool the use of which leads them to think differently.

- Todays stress results from the underinvestment of the past
- When standards slip the firm is weakended and the burden shifts to the customer

- Vision, Values and Mental Models are better managing standards as managing, organizing and controlling
- The best companies will be the ones that systemize ways to bring people together for learning
- A good organization is one where bad news travels upward fast

- Problems with todays management:

Management by Measurement	• Short-term focus • Ignoring intangibles
Compliance-based Culture	• Pleasing the boss • fear-driven management
Managing Outcomes	• Top-down targets • people held accountable for unrealistic goal
Predictability & Controllability	• Management as control • Planning, Controlling and Organizing
Competitiveness & Distrust	• People must compete to perform or innovate (Deming: critique of competition)
Loss of the Whole	• Fragmentation • local innovations stay local
Right vs. Wrong Answers	• Technical fixes favored • Systemic issues ignored
Uniformity	• Diversity seen as a problem, conflict avoided

The Seven Learning Disabilities

I am my position	**The enemy is out there**	**The illusion of taking charge**	**The fixation on events**	**The parable of the boiled frog**	**The delusion of learning from experience**	**The myth of the management team**
People focus only on their roles and lose sight of the bigger system. The result is volatile and extreme reactions to change.	When something goes wrong, they look for someone to blame. Even if the problem is systemic.	Acting reactive feels empowering, but it avoids deeper change. Proactiveness comes from seeing how we contribute to our own problems.	Only immediate crises are noticed. Patterns and systems are ignored.	Gradual change goes unnoticed, leading to slow decline or failure. #The biggest threats come from slow, gradual processes.	When feedback is delayed or unclear, learning is limited. **Learning Horizon:** the longest time between our actions and the consequences from which you can learn.	Teams hide weaknesses and pretend to agree, blocking real collaboration. When was the last time someone was rewarded in your organization for raising difficult questions about the company's currentpolicies rather than solving urgent problems?

The "Beer Game"

= A simulation created at MIT to show how problems in supply chains happen even with simple systems.

- In the game, players act as retailer, wholesaler, distributor, and factory.
  Each tries to meet customer demand for beer, but with delays and limited information.
- First the demand is constant, then there is a step up in demand of the beer. After theat the demand is constant.
- In spite of the simple increase and stable demand, the system of supply reacts extremely to the change, resulting in a shorta ge of beer and then missing orders

- It shows that even in simple systems, if people act only on their role and limited information, there can be a lot of problem s when changes occur
- Thinking in systems and looking at the bigger picture helps dealing with these problems

"Take two aspirin and wait" Rule:	When faced with a problem you do something to fix it and then wait to see the result. Do not overshoot the fix when the result is simply delayed.

Strategies

Two sets of questions

Deep Learning Cycle	**Strategic Architecture**
• what are our aims? • What are the fundamental areas of growth? • How would we know it if we saw it? • Learning is about developing a capacity to reliably produce a certain quality of results • The Deep Learning Cycle is made of Practices, Skills/Capabilities, Relationships, Awareness & Sensibilities ans Beliefs & Assumptions	• where do leaders focus their attention and efforts to create such a culture? • How can we do it? **Guiding Ideas:** • Concepts dictating why the organization exists • Purpose, Vision & Values **Innovations in Infrastructure:** • Formal Roles and Management Structures **Theory, Tools & Methods:** • Ideas on how things work • How theories are applied, problems are solved • How progress is monitored and differences are negotiated

8 Strategies for applying organizational learning

Integrating Learning and Working	**Starting where you are**	**Becomming Bicultural**	**Creating Practice Fields**
○ Learning has to be integrated into work and not seperated ○ It starts with identifying where learning can make a difference ○ Use **After Action Reviews (AAR)** ▪ What happenes? ▪ What did we expect? ▪ What can we learn? ▪ Write that down	Work on at least one impossible task a year. Something you don't even know how to approach	○ Having attitude and skill ○ **Stealth Transformation** ▪ Avoid Jargon ▪ Don't make a big deal about the change ▪ Keep attention low but involve everyone interested ▪ Underpromise and overdeliver	○ True learning comes from the opportunity to practice ○ Create an environment where it is ok to experiment and make mistakes

Connecting with the core of the business	**Building Learning Communities**	**Working with the "other"**	**Developing Learning Infrastructures:**
○ If you engage 20% of a group you reach a tipping point	○ Developing the capacity to talk openly in groups	○ Embrace diversity and different tyes of thinking in the team ○ Real community only happens if we are stuck together	**Training:** Instructural and formal training **Practice:** Simulations where knowledge can be applied and tested without consequence **Research:** Study of documented practices **Doctrine:** Articulating of assumptions

The 5 Disciplines

1. Personal Mastery

= the Pursuit of proficiancy in a field that matters to a person

• It's the discipline of personal growth and learning
• The spirit of a learning organisation
• It starts with identifying what matters to us
• People who see the vision as a calling and a goal worth archieving

• A **Personal Vision** comes from within and cannot be forced. People have to be encuraged to work on their personal dreams and the vision of the company needs to be aligned with them
• It is a process of continuously reminding us on what we really want and redefining what that means

• If people react with cynicism they are most often a frustrated idealist. Their expectations don't match reality.

Holding Creative Tension

Creative Tension = the gap between reality and what we want

• The tension needs to be balanced. Too low and we get lethargic. Too high and we get anxious.

• **Structural Conflict** = There is always a conflict between your vision pulling you towards it and resentment holding you back
• This conflict can only be overcome by changeing beliefs
• Tell the truth. Commit to finding out what reality really looks like

• Build an organization where it is safe for people to create visions, where inquiry and commitment to the truth are the norm, and where challenging the status quo is expected

2. Mental Models

= How we understand the world in form of assumptions, generalisations or images

• Resistance to change often comes from unconcious Mental Models
• Mental Models dictate how we interpret and see the world

• It starts with looking inward at what drives our behaviour
  Structures of which we are unaware hold us prisoner.

• Planning means to question our assumptions and Mental Models

• When orders fall. Most try to cut costs.
  Instead you sould imporve delivery and performance

Skilled Incompetence

• Most teams trap themselves in **defensive routines**, hiding lacking performance
• This keeps them from learning
• They only learn to avoid pain

Bad Mental Models to look after

• You have to work overtime to get promoted
• Everyone only needs to know no more than what is needed to execute his role
• The business is only about making money
• Workers do not have an impact on performance

4 Skills for Mental Models

Theory and Practice:	• Most Mental Models are unconcious. Peolpe just feel compelled to react in a certain way • While people not always act according to what they are saying, they always act according to their Mental Models • Ba aware of the gap between what you think and what you actually do • Find conflicting situations and try to align your behaviour to your values
Leaps of abstraction:	= jumping to conclusions without the right amount of data or thouht • Regularly ask yourself what you believe how the world works • Ask yourself if the beliefs you hold are based on data or generalizations
Left-Hand Column:	=A technique for revealing hidden Mental Models • Take an interaction you feel is not working. • Make a table with two columns. In the right column write a script on how the interaction is playing out. • In the left column wirte what you are thinking (but not saying) about the interaction. • Build a conciousness for stating the problems clearly and defining actions in these situations. • Look for how and if the problem is defined. • Look for what and if a solution is proposed and if a course to solve the issue is determined. • The only way to make a difficult situation more productive is to share the data on wich your assumptions are based and discuss resulting assumptions and beliefs • Assume all may be wrong
Balancing Inquiry and Advocacy:	= The process of articulating ones views and learining about other's **Advocacy:** Stating your views clearly State what you think and why **Inquiry:** Asking for other's opinions Ask for others to correct you and share their view Ask what data would change their views • Both need to be balanced for optimal learning • Managers need to tap into insights from others • The goal NOT to "win an argument" but to find the best one • Agreement is not the goal. It is to suspend the assumptions and give people a sense of being heared

3. Shared Vision

= A common understanding of the future we seek to create

• An Idea that inspires people to act on

• The result is principles and guiding practices

• It answers "What do we want to create?"
• People only focus on the long term if they want to, not if they have to
• Shared Vision merges from Personal Visions, aligned to a common purpose.
  Personal Vision is needed
• Shared Vision needs to be build. Invite people to join your vision and not impose it on them

Commitment:	Beliving in the vision and act on your own.
Enrollment:	= Becomming part of something by choice Supporting the vision and want to help it succeed.
Compliance:	following rules without real engagement.

• Only when people share the vision they become commited

• Holding the right amount of creative tension and focusing people on the same vision is key

Guidelines

• Be committed yourself
• State the vision as simple as possible
• Let others choose and don't convince them

• Make it positive (based on something you want) instead of negative (based on something to avoid)

4. Team Learning

= A collaborative effort for a group of people to grow more rapidly than the individual would otherwise

• Team Learning is performed by dialogue
• **Dialogue** = the suspension of ones assumptions to be examined

• It is not about accumulating knowledge
  It is about creating mental maps that guide and shape the perception and create a common understanding on how things work

Two Types of Discourse

• You should decide when meeting if you want to have a dialogue or a discussion

Dialogue:	= Talking through a topic, suspending beliefs and assumptions to build **shared understanding** • Noone wants to "win" • Focus is on analysing different viewpoints • Goal is to reveal incoherence in our thougths • Dialogue needs to be practiced regularly to build trust • Conflict is part of dialogue but escalation should be avoided • Teams build a language for describing the complexity of their work **Conditions for Dialogue:** • Everyone suspends their assumptions without emotion • Everyone regards each other as colleagues and shows respect to their views • Everyone understands the rules and difference to discussion • One must be a facilitator and keep people on track **Dealing with Defensiveness:** • State your own feelings • Acknowledge the other person might feel the same way • Ask for their help to look for the cause
Discussion:	= structured exchange of views to make descisions • Has a clear goal and timeframe • Peolpe state and defend their views • The group decides on how to act

The 5th Discipline: Systems Thinking

= The Understanding of Systems as a whoe instead of focussing on single concepts and linear causality

- Look for interrelationships rather than things
- Try to see the process of change, rather than single root-cause steps
- Think in closed loops and systems of things instead of linear causes
- If you don't change how the whole system works, the problems come right back

The 11 Laws

1. Today's problems = yesterday's "solutions"	• Fixes often create new problems later • Avoid solutions that simply shift the problems • **"Shifting the burden dynamics"** = fixes that only act on a symptom of a problem or are just short term solutions • These fixes lead to dependency on the short term solution
2. When you push, the system pushes back	• Resistance grows when you force change • Systems push to stay the same • There are **"compensating feedback loops"** that balance the system to a specific state and act against change
3. Behavior grows better before it gets worse	• Early improvements can be misleading • Long-term problems may still build up
4. The easy way out leads back in	• Simple fixes don't solve root causes • You end up stuck in the same loop • You grow independant of the short term solution and need more of it **("We need a bigger hammer" - Syndrom)**
5. The cure can be worse than the disease	• Solutions may bring side effects • Trying to fix things fast can backfire • The long term solution must help the system to solve the problem itself
6. Faster is slower	• Pushing growth too fast leads to failure • Systems have natural limits and rhythms • The optimal rate for change is usually not the fastest possible
7. Cause and effect are not close in time and space	• What you do now may have effects much later • Consequences often appear far from the action
8. Small changes can produce big results	• Tiny, well-placed changes can shift the whole system • These points are hard to spot • You need to understand the underlying structures first
9. You can have your cake and eat it too	• You don't always have to choose either/or • Look for smarter solutions that balance both
10. Dividing an elephant in half does not produce two small elephants	• Breaking complex problems into parts loses the whole picture • Systems must be seen as wholes • Specialisation and fractionation of knowledge keep the focus from the whole
11. There is no blame	• Blaming others blocks learning • Everyone is part of the system and shares responsibility

2 Types of Complexity

Detail Complexity:	Complexity caused by many variables in a system
Dynamic Complexity:	Complexity caused by complex interrelationships and interactions between parts of a system

- Most leverage in business lies in dynamic complexity

Cycles of Causality

- Rather than linear cause-effect chains, reality is made of circles
- Example: Filling a glass of water is a circular system of cause and effect, regulating the amount of water filled

Two types of feedback loops

Balancing:	• Effect-Cause loops that level a variable to a specific value • E.g. Filling a glass of water balances the amount of water • Balancing processes create resistance to change • Often unspoken rules like "you have to work overtime to get promoted" cause balancing feedback
Reinforcing:	• Effekt-Cause loops that build up or decline a variable E.g. a snowball rolling down a snowy hill Small actions growing into big consequences leading to **"vicious cycles"**

- Feedback loops do also have **delays.**
- They can make you overshoot the adjusting behaviour. Like turning the temperature too hot or cold in the shower because the t emperature changes too slowly

Systems that control events

- There are secific "system archetypes" that dictate how systems work
- These systems consist of the types of feedback-loops and delays

Limits to Growth:	• Situations where growth slowly slows and reaches a limit • It consists of one reinforcing process and a balancing one • E.g.: The company grows and hires fast to meet demand. **(Growing Action)** As more employees join, coordination becomes harder and systems get stretched. **(Condition)** Miscommunication and delays increase, reducing overall productivity. **(Slowing Action)** The organization hits limits in training, leadership capacity, and structure. **(Limiting Condition)** • To solve it ,identify the Slowing Action and reduce it • Always focus on the next limitaiton to your growth
Shifting the Burden:	• Cycles of treating the symptom instead of the cause • Fast fixes are used to solve a problem temporarily • The problem comes back and side effects build up over time • Dependency builds up towards the symptomatic solution • E.g.: Using experts to solve the problems (**Symptomatic Solution**). The problem (**Problem Symptom**) is solved and leads to a quick fix. The expectation of te problem being solved by someone else rises (**Side Effect**). Next time the expert is needed again. The Ability to solve the problem (**Fundamental Solution**) is neglected. • To solve it, strengthen the balancing process of the fundamental solution and weaken the one with the symptomatic solution

System Architypes

Limits to Growth	Something grows well, but hits a ceiling unless the constraint is removed
Shifting the Burden	You treat the symptoms, not the root cause — and the problem returns
Eroding Goals	When results drop, expectations are lowered instead of solving the issue
Escalation	A rivalry or competition spirals out of control
Success to the Successful	The winner keeps winning, the weaker gets weaker
Tragedy of the Commons	Everyone takes more, and the shared resource collapses
Fixes that Fail	The fix works short-term but causes bigger problems over time
Growth and Underinvestment	Failure to invest in time leads to poor performance and shrinking growth
Accidental Adversaries	Two groups try to help but end up blocking or harming each other
Attractiveness Principle (from Fieldbook)	Tempted by what's easier, people abandon the deeper work