



GUEST EDITORIAL

Guest editorial

The Learning Organization turns 15: a retrospective

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Abstract

Purpose – The purpose of this paper is to introduce the Special Issue; to provide a practitioner’s retrospective views of the learning organization concept; and to comment on the status of *The Learning Organization* journal.

Design/methodology/approach – The approach adopted involves recounting a personal history of a practitioner’s experiences with the concept, and an observation on the health of *The Learning Organization* journal.

Findings – The paper finds that, although the learning organization concept is deemed narrow and out of date, it is judged to have had significant positive influence on organizational thinking. *The Learning Organization* is shown to be a healthy and popular journal.

Originality/value – The paper is included in a Special Issue that is part of the series commissioned by the journal on organization-related topics of interest to its readers. Its originality stems from its examination of the learning organization concept through a particular practitioner’s lens, provoking reflection amongst others engaged in both the delivery and the consumption of practice and study.

Keywords Learning organizations, Serials, Learning processes

Paper type Viewpoint

The Learning Organization (TLO) celebrated its 15th birthday in 2008, and I also planned for 2008 to be my last year as *TLO*’s Editor – Special Issues. The final Special Issue (SI) for which I was to be responsible was scheduled to publish at the end of 2008 (actually I have agreed to continue in this role for one more year for reasons of journal continuity), and I thought it would be appropriate to devote that SI to manuscripts written specifically for the SI by each of the journal’s past editors – their retrospectives of both *TLO* as it turns 15 and the “Learning Organization” (LO) concept from which it was born.

In order of our editorial tenure this group comprised: John Peters, myself, Paul Tosey, Jim Grieves, Steven Cavaleri, and Steven Walczak. Each was invited to reflect in their own inimitable style on some or all of past, present, and future aspects of the *TLO* journal and the LO concept, with emphasis as always on practical insights. Everyone agreed, and this SI is the result. Each paper is in the order of tenure, except that I have chosen to provide my contribution here as part of an opening editorial for the SI.

The notion of the LO has proven a durable if somewhat vague concept. Perhaps it has been a lasting notion because its lack of clarity has given managers, researchers, students, practitioners of all stripes, and yes – editors, lots of room to make of it what they wished. Whether this is a positive or negative outcome is debatable; certainly each of *TLO*’s past editors has interpreted the concept in their own fashion, and in so doing they have not only shaped the journal, but have influenced LO research and practice, and have themselves been changed in this process and through the passage of time.



Each of their contributions here reflects their past experiences and current views regarding their *TLO* and LO journeys. My sincere thanks to all my editorial colleagues for contributing their very insightful viewpoints to this SI:

Our first piece is by John Peters, who is now Chief Executive, Emerald Group Publishing, together with Kate Snowden, Publisher, Emerald Group Publishing. John and Kate contribute a unique view – Emerald publishes *TLO*. First they contrast the role and quality of learning in organizations when John was Editor of *TLO* versus today, when organizations may acquire vast amounts of knowledge instantly “at the click of a mouse”. John and Kate go on to suggest that the LO’s life signs are minimal, and its viability will depend on fostering much older capabilities such as action learning and critical thinking. They close with a commentary on how learning is currently treated at Emerald.

Paul Tosey thinks of the LO more as a story than a subject, and his piece reflects this view, being replete with stories and illustrations. In particular his article is a tribute to Gregory Bateson, whose ideas he feels “not so much add to thinking about the Learning Organisation as turn it upside down”. Paul argues that organizational learning always involves a relational context and he explores human interaction and the concept of meta-communication. He joins others in viewing the LO as “a good thing” but discusses both the desirable and shadowy side of learning in organizations, and muses on the question of whether learning organizations can be enduring structures.

Jim Grievess proposes that we abandon the idea of the learning organization altogether on the grounds that it was an imaginative idea that has run its course, and indeed may be harmful. He challenges us to explore our own views and to open up this idea for debate. Jim first disputes the premises that the learning organization is an ideal worth striving for and that systems theory provides a sound theoretical underpinning. He then goes on to explore problems he sees with the overall LO concept, and provides a case study at Siemens to illustrate the shadowy side of the LO. Jim closes with six critical questions for us to contemplate.

Steven Cavaleri notes that there is still no generally accepted LO template to provide executives with a compelling case for implementation. This implies that the LO is not practical, and hence not pragmatic. Steven maintains that many organizational learning theories are rooted in philosophical Pragmatism, and he traces the influence of philosophical Pragmatism on the LO. Unfortunately as Steven shows, the LO only borrows small pieces from a larger Pragmatism framework; he argues that this truncated use causes the LO’s general ineffectiveness. Steven explores the pragmatic principles underlying Deming’s teachings, and discusses Toyota’s successful efforts to become a LO based on their version of the Pragmatic organization, and tenacious application of Deming’s teachings.

Steven Walczak presents a condensed literature review of international Knowledge Management (KM) and Organizational Learning (OL) research, arguing that although these have been extensively researched in Western economies, they should be examined in developing and more developed Eastern nations. Steve notes that a major criticism of KM and OL definitions applied to developing knowledge economies is their foundation in American/Anglo-Saxon contexts, and argues that they must be capable of incorporating cultural and political differences from other environments. He reviews three lines of research, and provides discussion of typical results. Steve concludes that KM and OL research must become more adaptable and responsive to the different needs of organizations located throughout the world.

These five papers reflect a relatively gloomy, if not downright negative current view of the LO. This may be contrasted with TLO, which is in good health according to Walczak (2007), p. 469; Walczak, 2006, p. 541; I suspect that *TLO's* vitality is in part thanks to the journal's inclusive editorial objectives that are centered on "the conceptual underpinnings and practices most beneficial to companies pursuing strategies for becoming knowledge intensive organizations".

As for my own piece, I have found it extremely difficult to write. Firstly I have felt more and more over the years that the LO as a prescriptive initiative has had little relevance to my interests and practice. Second, as an author, and as an editor of this journal in the mid-1990s and guest editor through to the present, in my writings I have long ago expressed just about all I have ever wanted to say about the LO. Not surprisingly, my views, and those of the editorial group represented here, are very much in tune with those of practitioners, consultants, researchers, and students, engaged in organizational-related fields of interest. In their recent excellent paper, Rebelo and Gomes (2008, pp. 294) crisply summarize the situation: "At the beginning of the new millennium, academic and managerial interest in these concepts (organizational learning and the learning organization) started to wane slightly and the suspicion that organizational learning was merely a fashion has increased, as have the critical voices around it."

What a sad commentary on the fate of a vision that managers, researchers and practitioners largely lauded as the Holy Grail of the 1990s and potentially for decades to come. Does it not stir the blood still "... learning organizations, organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together" (Senge, 1990, p. 3)? To attain this paradise we had only to undertake a crusade to destroy "the illusion that the world is created of separate unrelated forces" using the tools and ideas described in Senge's book (*ibid*, p. 3). Crusades are tricky things, but given the original extent of support and enthusiasm it begs the question "So what went wrong?" For my own very personal retrospective answer I must go back in time to the late 1980s.

In 1989 I was a dedicated action learning devotee, and working at what was then the one of the biggest companies in the world (Company X), leading a "Learning Services" function. An unlikely circumstance given that the company knew all the questions and the answers, and simply announced change. The plus side of this arrangement was that odd-balls like me were accepted and provided with funds to explore cutting-edge ideas where the organization's forward-looking image might be enhanced, and particularly where technological research was already being funded, e.g. MIT.

When Peter Senge's book came out in 1990 I read it avidly and with great enthusiasm. Peter was not the first to propose a LO concept by any means. For example, the in my opinion much under-valued Revans' essay from 1969 (1982), and Garrat (1987) are early examples; however, there can be no doubt that Peter established "the brand". At the beginning of my retrospective then, the LO concept meant for me Peter's vision and the five disciplines that went with it. Later that year a colleague and I went to meet with Peter at MIT; the outcome was that Company X became one of the sponsor members of the fledgling MIT Center for Organizational Learning, and I and a few colleagues became participants.

We undertook five one-week Competency Courses through 1991, and I also attended a summer school on microcomputer simulation and system dynamics run by John

Sterman at MIT. Somewhere along the way I was also a participant in a Personal Mastery workshop run by Peter Senge and David Kreutzer, and I continued to attend the various Learning Labs, Center meetings and conferences until 1994. In 1992 I had left Company X to become a consultant; however, Peter generously allowed me to continue to attend and participate in Center activities until 1994, when I gave up my membership since I could no longer in good conscience say I was a believer.

I have given the above account to underline that I should have been a learning organization disciple, but I was not. First, although LO implementation had been presented to participants in the LO Competency Courses as a project-by-project “infiltration” that through its efficacy would “sell” itself into an organization, it seemed clear to me that it was in fact a capital “I” initiative, that would require the kinds of time and high-power resources that would draw the attention of a company’s senior executives in a hurry. Unfortunately these are the same executives who will typically deny the need for a LO. Anyone having practical experience of introducing the LO concept to their organization knows how difficult the effort quickly becomes as organizational resistance forms. By 1994, Senge himself seemed to have come to this realization: “Skills involving fundamental new ways of thinking and interacting take years to master. New sensibilities and perceptions of our world are a by-product of long-term growth and change. Deep beliefs and assumptions are not like light switches that can be turned on and off” (Senge *et al.*, 1994, pp. 21-22). That the emerging business demands of the early 1990s were also likely to discourage potential organizational adopters was noted by Drew and Smith (1994, p. 4): “Many executive and management teams are now overloaded to an extreme degree. Consequently, failure to pursue the ideal of a learning organization is more often due to short-term pressures, or lack of energy or resources, than a disbelief in its merits.” Even today, implementation is not unproblematic: “. . . it is apparent that there are no easy answers to questions such as what is a learning organisation and how might a manager introduce the concept into a mature, large organisation.” (Thomas and Allen, 2006, p. 127).

Second, and therefore not surprisingly, I and my colleagues had had only limited success introducing our new found LO capabilities into formidable Company X; although there had been a growing acknowledgement in Company X since it had mixed oil and water on a large scale in 1989 that it did not know all the answers, and learning and training rather than just training had become more widely accepted – hence the formation of the Learning Services group. Our LO-related efforts are reviewed in Watkins and Marsick (1993, pp. 35-39). From the beginning we adopted an inclusive (multi-functional change teams) and business focus (“leveraged learning” – learning that helps achieve the business objectives). Work as learning was emphasized, and a simple systemic three-element learning/performance model was introduced as a means to facilitate dialog. Causal systems thinking, the key-stone of Senge’s LO concept, never got off the ground. I have occasionally noted that in my experience people are not natural systems thinkers (Smith, 2007, p. 471) ready to “give up the illusion that the world is made up of separate unrelated forces” (Senge, 1990, p. 3), and Yeo (2005, p. 374) notes that this attitude is still prevalent today even at intellectual levels: “It is astounding that the learning organization literature largely treats the subject (LO) as if it can be practiced independently from systems thinking.” There is at last perhaps some good news – in Carol Ann Zulauf’s experience with the younger generation of MBA students, there is now ready acceptance and usage of system dynamics (Zulauf, 2008).

In contrast to the resistance to adoption of Senge's casual systems thinking, general systems theory (Rapoport, 1986; Ackoff, 1981) was accepted and applied in some management circles at Company X. This may have been due to the influence of Russaell Ackoff and his colleagues from Interact who consulted to the company for part of this period. Their approach to organizational development seemed to me to be highly pragmatic, and the discipline of their systems thinking was infectious and persuasive. Their influence has had a significant effect on my thinking and work to this day, and when I later went into consulting I continued to be formally associated with this group.

Third, during my Company X endeavors I was not seeing a significant success rate in the projects that were undertaken by other MIT Center member organizations, except where high-profile "flagship" projects were staffed with lots of famous authorities. Even where success was attained in such projects, I took to heart that the organization involved often "circled the wagons" to downplay the project's success, and eventually acted to try to squeeze out those involved – clearly I was dealing with an area requiring high career-related courage.

Lastly, respected authorities were beginning to openly question the LO concept (Handy, 1990; Garvin, 1993; Davis and Botkin, 1994). Daniel Kim (1993), who had been one of the leaders of my MIT LO Competency Courses, had noted that there was little agreement on how to create a learning organization, and Senge added to the confusion: "There is no such thing as a learning organization. Learning organization is a category that we create in language . . . we are taking a stand for a vision . . . it is not the vision but what it does that matters . . ." (Kofman and Senge, 1993, p. 16). Smith and Saint-Onge summed it up thus: "Unfortunately this concept (the learning organization) is like a cubist painting – full of ambiguous viewpoints." (Smith and Saint-Onge, 1996, p. 8).

I essentially follow Yeo (2005, pp. 368-379) in assuming "that the term 'learning organization' is a collective entity which focuses on the question of 'what'; that is, what are the characteristics of an organization such that it (represented by all members) may learn?. On the other hand, 'organizational learning' is a process which answers the question of 'how'; that is, how is learning developed in an organization? . . . the term 'organizational learning' is used to refer to the process of learning while the idea of 'learning organization' refers to a type of organization rather than a process." On the basis of my experience at Company X I, like Handy (1990, p. 225), supposed that Senge's LO was "a good thing to strive to be", assuming that the concept was applied ethically; however, I could not in good conscience apply Senge's prescription. It seemed to me there were many processes and tools that would facilitate approaching a LO vision, and so I became a quasi-practitioner of organizational learning (OL).

At the beginning of my consulting practice in 1992 I had the great good fortune to meet a courageous executive at one of Canada's major banks, who had the temerity to want to turn it into a LO and who felt that I could help him. Accounts of our work and its successful outcome have been detailed elsewhere (Smith and Saint-Onge, 1996) and in a case study (Smith, 1999). Although I had not become a LO disciple, in this project I did not throw the baby out with the bath water, believing that much of the OL and general systems theory that had worked at Company X would work in the bank.

The project was founded on the notion of learning as a social process best effected by creating conditions under which people form habits of learning together by doing their work, not by setting up formal programs to tell individuals how to learn and think – the

latter may be facilitative but should be unique JIT efforts. The roles of all employees, including managers (!), were changed such that all were forced to change their habits of thinking and learning without being necessarily aware that this was happening – learning was made an implicit element of the bank’s business processes. In this way a new culture was pulled into being; this contrasted with the typical LO implementation of that time (and possibly now) that was like pushing on a rope, being based first on explicitly changing an organization’s culture, not its structure. Social learning cycles, based on action learning and Deming’s quality cycles plus performance enablers (identify anything that will help you improve performance) were introduced to employees to provide them with means of self and community job improvement (Smith, 1999). Performance strategy and planning were driven by a framework of three performance drivers that provided a common systemic language for dialog, and “fields” that acted as a malleable “attractor” (Waldrop, 1992) for planning, sense making, and innovation. A systemic outlook was maintained throughout the implementation, and simulation based Learning Labs were used to great effect. Last, but by no means least, the organization had a knowledgeable senior management who believed in the approach, and demonstrated vocally and through their actions their dedication to a successful implementation (Smith and Saint-Onge, 1996).

The outcome of these initiatives was a LO-based entity, termed an “evolutionary organization” (Smith and Saint-Onge, 1996), that was pragmatic, systemic, based on social learning principles (Mavin and Cavaleri, 2004), and capable of self-renewal. The resulting organization was strikingly similar to the “Enterprise as a Learning System” described by Revans in 1969, whose capabilities he summed up as follows: “The most precious asset of any organization is the one most readily overlooked: its capacity to build upon its lived experience, to learn from its challenges and to turn in a better performance by inviting all and sundry to work out for themselves what that performance ought to be” (Revans, 1982, p. 286).

By the completion of the bank project it seemed to me there was little practical value in pursuing endless definitions of the LO. I hold this view today, and I have not been alone in this; for example Örtenblad noted in, 2004 that “Someone has to try to improve the concept’s clarity if the idea of the learning organization is to have a chance of becoming anything more than ‘only’ a fashion” (Örtenblad, 2004, p. 131), and in, 2007 this same author, having identified 12 (!) LO definitions from the literature, exclaimed “With all deference to ambiguity, there must be some limits.” (Örtenblad, 2007, p. 118). As Raili Moilanen (2005, p. 85) notes “It almost seems that the field is like a field of flowers, and all flowers are allowed to flourish. There is nothing to be said against this situation, but some questions will inevitably rise from it. What is the future of this discussion and thereafter the concept of a learning organization? Will “the learning organization” be left to be as a soap sliding from our hands or as an amoeba that cannot be touched or caught?” When all is said and done however, I do firmly believe that in giving us specifically his organizational vision (without the five disciplines) “. . . organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (Senge, 1990, p. 3) Peter Senge made a significant and still valid contribution.

Further nailing my editorial colors to the *TLO* mast, I see nothing wrong in defining and striving toward some such vision for a particular organization without agonizing

over whether this merits calling the organization a LO. I also believe it is fruitful to explore, and to learn from such exploration, what tools and processes will facilitate approaching such an organizational vision, and in my own research and practice that is what I have tried to do since the early 1990s. These explorations have indeed involved organizational learning and knowledge management, but they have also included many other topics (in no particular order) such as leadership, social networks, emotion, complexity/chaos, systems, technology, and currently include organizational aspects of social economy theory and practice (Smith, 2008). This is not said to confirm that I try to keep busy, but to emphasize that today in my view the field of organizational research and practice is rich in content and extremely healthy; that all these various topics are at home in the pages of *TLO*; and that a narrow outlook based on the LO has been out of date for some time.

My personal retrospective ends therefore on a very positive note, but as always I sincerely welcome the views of you the readers, and encourage you to contact me to comment on the current SI or to propose one of your own.

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Further reading

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