

# Strategic Learning

St. Luke's Health Initiatives TAP Group  
Session 4: September 9, 2015

## Learning Objectives

- Assess your organization's readiness
- Identify your organization's strategies
- Write a strategy as a testable hypothesis
- Assess the rationale for your strategies
- Identify data to gather to test hypotheses
- Compare intended outcomes to actual outcomes
- Improve your strategies in a cycle of learning

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# TAP Group Overview

Session 1: Readiness for Strategic Learning

Session 2: Roadmap of our Strategies

Session 3: Intended Results vs. Actual Results

Session 4: Turning Understanding Into Action

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# Check In

- Your name, organization
- What is your current action hypothesis?

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## Strategic Learning Review

- Readiness for Learning
- Express your strategy as a hypothesis
- Splash and Ripple
- Measuring your outputs - “If we do this...”
- Measuring your outcomes - “... then this will happen.”

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## Ready for Strategic Learning

- Commitment from leadership
- Motivation to improve
- Supportive team players
- Regular and structured communication
- Safe space for constructive reflection
- Brave space for reflective construction

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## Strategy as Hypothesis

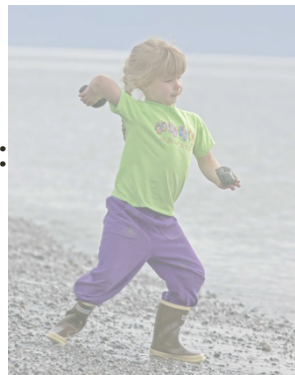
- Written as an *If... then...* statement.
- If << we do these things >>, then << we expect these results >>.
- A hypothesis expresses your **current understanding** of how things work for your organization.

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## Splash and Ripple

Think about your hypothesis:

- What are the rocks, kid, and pond (resources)?
- How and when do you throw your rock (activity)?
- What is the splash (immediate output)?
- What are the ripples (outcomes)?



>>>> Is your “then...” a splash or a ripple?

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## Finding the Right Data

### *Part 1:*

If << we do these things >> ,

- Fidelity to intended actions
- Monitoring and record keeping

### *Part 2:*

then << we expect these results >>

- Indicators of success
- Establish a baseline
- Collective interpretation

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## Reflection on Your Strategy

- What is your hypothesis?
- What is your splash (outputs, *monitored*)
- What are your near ripples (outcomes, *measured*)
- What are your far ripples (impact)

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## Shared Interpretation of Data

- Multiple perspectives
- Enhances learning - you learn better together than as an individual
  - “If you want to go fast, go alone; if you want to go far, go together.”
    - African proverb

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## Before Action Review (BAR)

A BAR is a learning tool that helps you tap the right people and find the right data.

- What are our intended results?
- What will success look like?
- What challenges might we encounter?
- What have we learned from similar situations?
- What will make us successful this time?
- When will we do an After Action Review?

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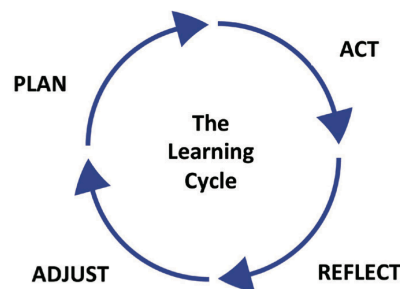
## How Does Learning Happen?

- Expected results (expressed in BAR)
- Actual results (discussed in AAR)
- Learning happens by actively and honestly comparing expected results to actual results
- Adjusting your strategy
  - Actions are modified
  - Intended results may shift
- Learning Cycle

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## After Action Review (AAR)

Completes the Learning Cycle



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## After Action Review (AAR)

An AAR is a learning tool that helps you adjust your actions.

- What were our intended results?
- What were our actual results?
- What caused these results?
- What should we sustain in the future? (plus)
- What would we do differently? (delta)
- When is our next opportunity?
- When will we do our next BAR?

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## After Action Review (AAR)

### Case Study

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## After Action Review (AAR)

### What were our intended results?

- Reminds your team of intended results - sometimes very quickly answered.
- Reinforces accountability to intentions.
- If there is disagreement about what was intended, it's a symptom. Dig into this in the question about causes.

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## After Action Review (AAR)

### What were our actual results?

- Focus on *just the results* - don't ask, "What happened and why?"
- Keeps the conversation honest.
- Both successes and failures can teach you.
- Be alert for the tendency to rationalize or explain - defer this to the next question.

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## After Action Review (AAR)

### What caused these results?

- This is the heart of learning!
- Dig deep - probe with questions like, “And what caused *that?*”
- Think about the *system* and interrelated parts.
- If expectations were not met, ask questions like “What got in the way?”

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## After Action Review (AAR)

### What should we sustain in the future? (plus)

- Sometimes the focus is too much on what went wrong - begin with positive.
- Reinforces what you already know, cements into place.
- Takes the focus from the past event to future opportunities.

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## After Action Review (AAR)

### What would you do differently? (delta)

- Generates insights for new learning.
- If struggling to answer, say something like, “If you could turn back the clock, what would you do differently?”
- Deliberately looks forward to next opportunity.
- **This strengthens the weak link in the learning cycle!**

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## After Action Review (AAR)

### When is our next opportunity to test what we have learned?

- *Always* identify the next opportunity - what are you going to do with the new learning?
- Lessons aren't learned until they are *applied*.

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## After Action Review (AAR)

### When will we do our next BAR?

- Strategic learning must be *deliberate* and *cyclical*.
- Get it on the calendar *now!*

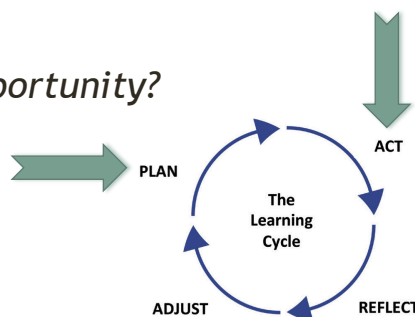
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## Opportunities

### Turning learning into practice

- A changed mind
- Changed actions
- Changed results

*When is your next opportunity?*



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## Coaching Follow Up - Splash

Within the next *week or two*, schedule a time to talk about.

- Your strategy (hypothesis)
- Your measurement processes
  - Monitor outputs
  - Measure outcomes
- Your process for reflection and review (AAR or other)

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## Coaching Follow Up - Ripple

Within the next *month or two*, schedule a time to talk about How your team is working with

- Assessment
- Reflection
- The cycle of learning

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