
Audit Recommendations for the Learning Organization

Introduction This joint audit report contains recommendations for a production/supply system that works best for all its “players.” Reaching beyond the reactive and adaptive thinking that dominates the root beer game, players experience a subtle but important mind shift:

- from a “separated” perspective: maximizing profits by managing one’s position as well as possible; seeing problems as caused by external forces.
 - to a “connected” perspective: creating a learning organization where people continually discover causes of behavior in that system.
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Quality documentation Documentation for an effective learning organization requires

- a systemic perspective for documents written at each organizational level.
- writers open to and aware of new mental models.
- a long-term commitment to a shared vision.
- team skills for seeing the bigger picture.
- incentives for learning how one’s individual actions affect our wider reality.

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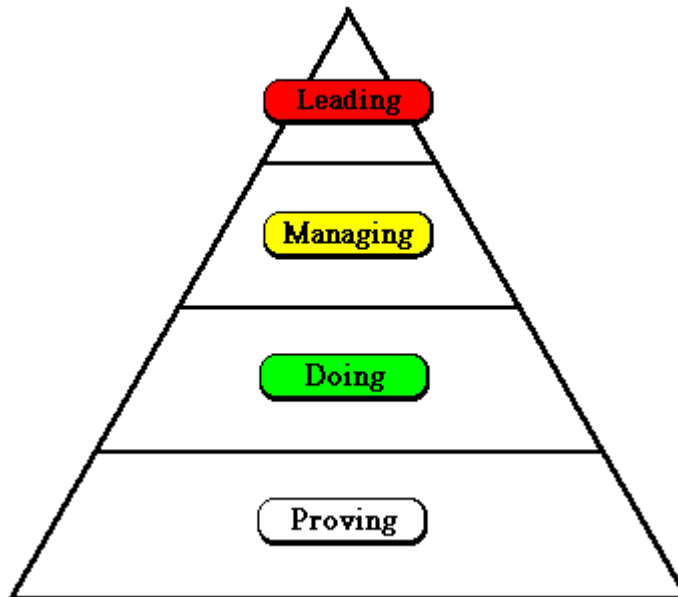
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Functional Layers of a Traditional Organizational Pyramid

Introduction Traditional organizations have at least four functionally distinct layers.

Picture This picture displays the distinct functional layers of a traditional organizational pyramid.



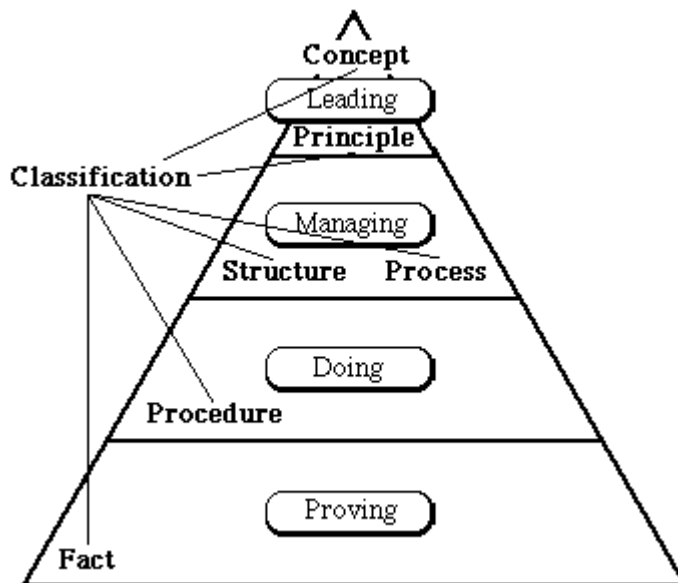
Document types Unstructured writing practices dominate the traditional organization. This table displays document types at each functional layer of the traditional organization.

Function	Document Type
Leading	<ul style="list-style-type: none"> • Policy • Law • Regulation
Managing	Procedure
Doing	Work Instruction
Proving	Records

Information Types in Structured Writing

Introduction Structured writing practiced by technical writers in traditional organizations for the past 25 years analyzes and presents information in seven types. Conflicting sets of standards and terminology has caused confusion, especially about what is a procedure or a process.

Picture This picture displays seven information types in structured writing at the four layers of a traditional organizational pyramid.

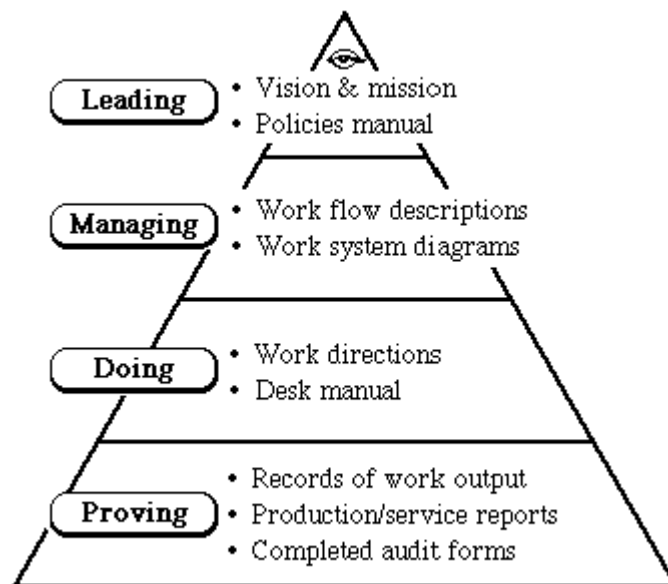


Documentation Layers in the I.S.O. 9000 Organization

Introduction Writers documenting quality organizations for the past few years must meet international standards. The system of documentation that has resulted in an organization's being certified by I.S.O. standards is vertically integrated:

documents at each layer of the quality organization
reflect documents at layers above or below.

Picture This picture displays the four levels of an I.S.O. 9000 organizational pyramid, with typical documents for each layer.



Levels of the learning organization

The learning organization includes five levels, from most abstract and general to least abstract and specific:

1. learning,
 2. leading,
 3. managing,
 4. doing, *and*
 5. proving.
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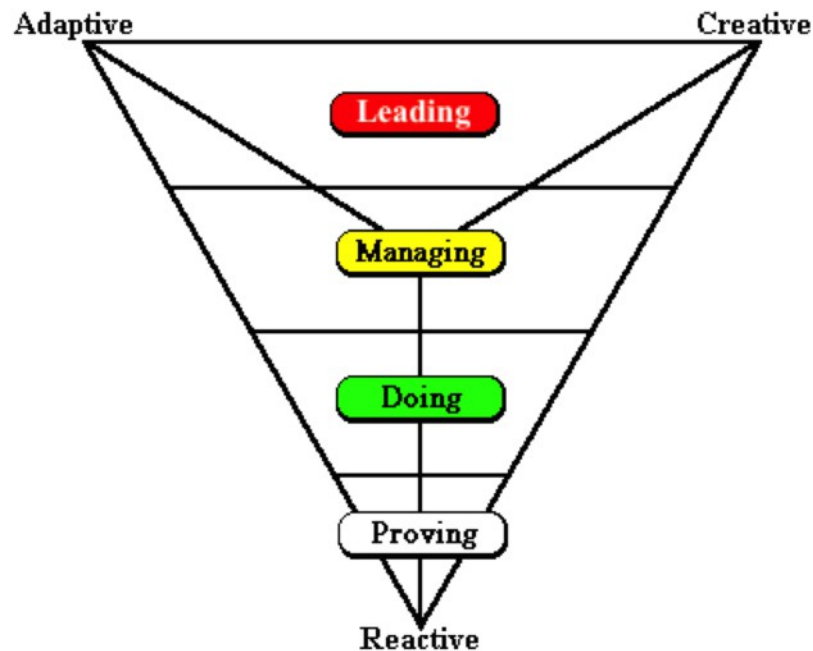
Benefit of clear terminology

Documentation for the learning organization eliminates confusing terminology. Accurate and precise terms tag each of eight fields that display information.

Directions of Thinking in the Learning Organization

Picture

This picture displays a balance of three dynamic directions of thinking at the organization's learning level: creative, adaptive, and reactive.



Definitions

This table defines and displays examples of three thinking directions.

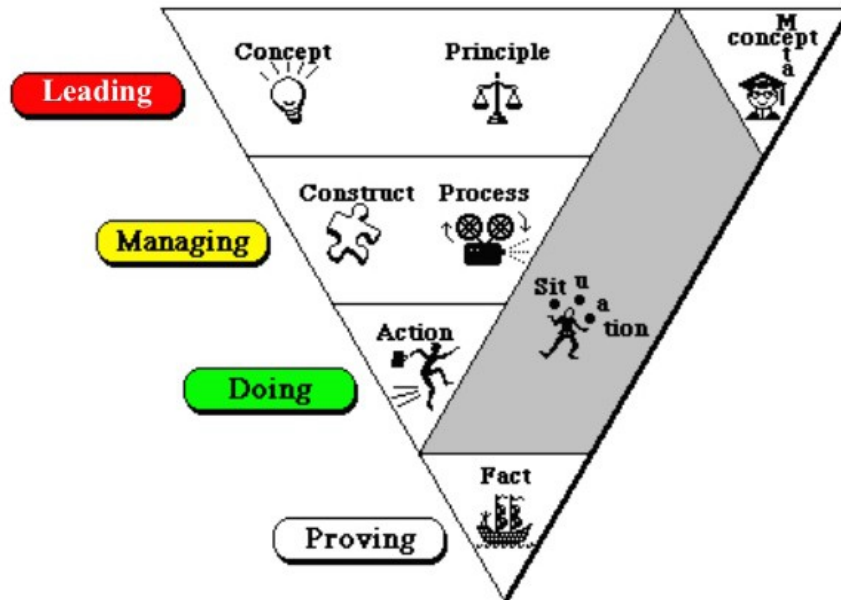
This thinking direction...	is organizational thinking that... .	Example from the root beer game
creative	continually expands capacity to build its own future by discovering systemic causes of behavior	<p>“We need to adopt ordering policies that consider the effects of the</p> <ul style="list-style-type: none"> • built-in delays in filling new orders. • vicious cycle of rising delivery delays that lead to placing more orders.”
adaptive	<p>responds to shifting trends by</p> <ul style="list-style-type: none"> • focusing on patterns of behavior, <i>and</i> • assessing their meanings 	<p>“Distribution and marketing systems tend to be cyclical and unstable. Instability is worse the farther upstream you are from the retailer. Eventually, severe crises will probably occur at the top of the system.”</p>
reactive	focuses on day-by-day events: when who did what to whom	<p>“I ordered forty cases of root beer that week because my retailers ordered 36 cases, and wiped out all my stock.”</p>

More...

More...Directions of Thinking in the Learning Organization

Picture

This picture displays the four organizational levels overlaid with eight fields for displaying documentation at each level.



Documentation levels

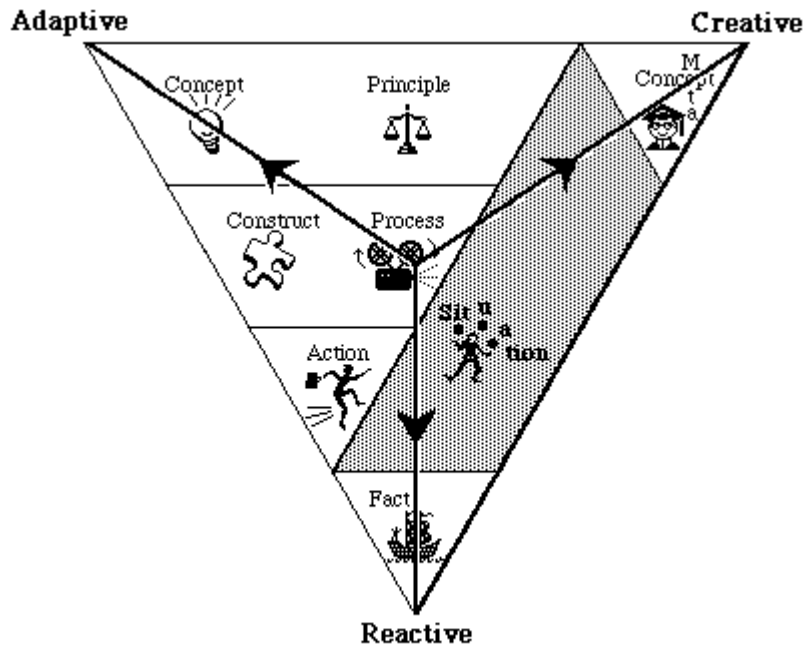
This table compares display fields with the typical documentation for each of the four organizational levels.

Level	Documentation	Display Fields
Leading	<ul style="list-style-type: none"> • Vision statement • Mission statement • Policies manual 	<ul style="list-style-type: none"> • Concept, • Principle, • Situation, <i>and</i> • Metaconcept
Managing	<ul style="list-style-type: none"> • Work flow descriptions • Work system diagrams 	<ul style="list-style-type: none"> • Construct, • Process, <i>and</i> • Situation.
Doing	<ul style="list-style-type: none"> • Desk manuals • Work directions 	<ul style="list-style-type: none"> • Action, <i>and</i> • Situation.
Proving	<ul style="list-style-type: none"> • Records of work output • Completed audit forms • Production and service reports 	Fact

More...Directions of Thinking in the Learning Organization

Picture

This picture overlays the three directions of thinking in the learning organization on display fields for documenting systemic functions.



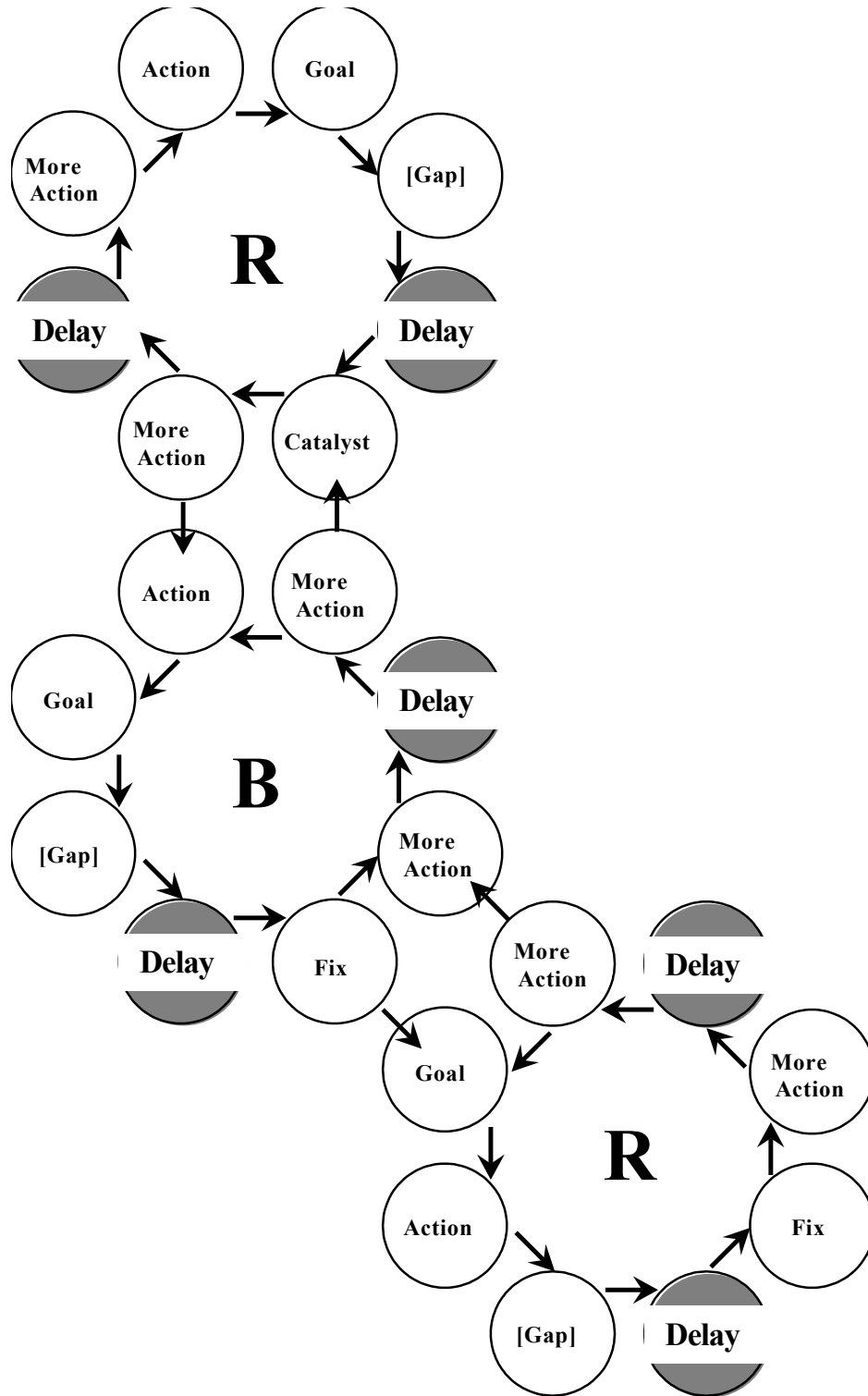
Systems thinking

This table displays the power and frequency of three directions of systems thinking, and relates them to display fields.

Learning	Power	Frequency	Documentation Fields
creative	most powerful	least common	<ul style="list-style-type: none"> • metaconcept • concept • principle • situation
adaptive	moderately powerful	moderately common	<ul style="list-style-type: none"> • construct • process • situation
reactive	least powerful	most common	<ul style="list-style-type: none"> • fact • action • situation

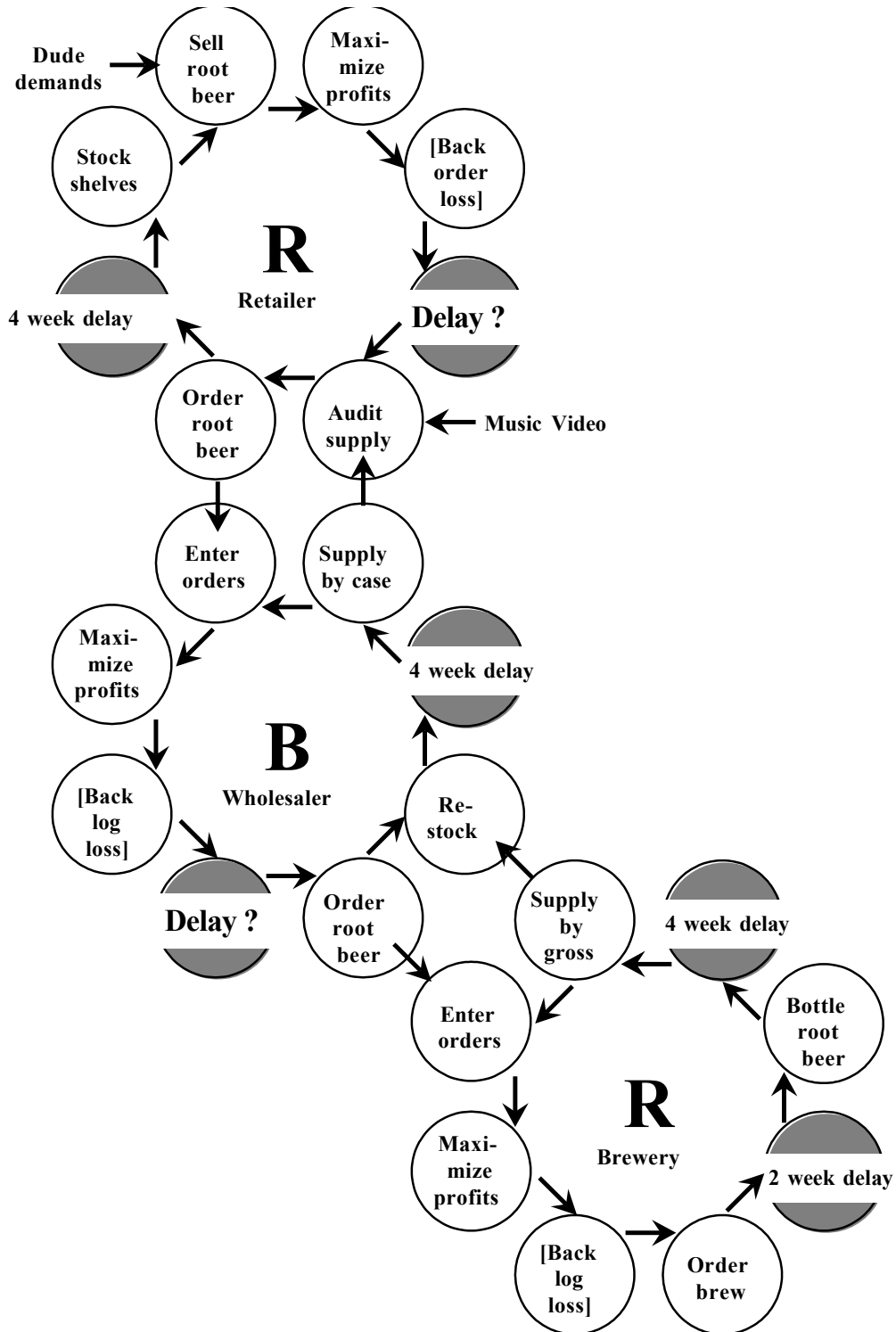
Generic Production/Distribution System Loops

Picture This picture displays the generic root beer production/distribution system.



Root Beer Production/Distribution System Loops

Picture This diagram displays the specific phases of the root beer game system.



Before and after Overcoming Seven Learning Disabilities

Introduction These organizational learning disabilities appear in chapter two of Peter M. Senge’s book about learning organizations, *The Fifth Discipline*.

Contrast table This table contrasts one’s state of mind before and after overcoming the seven disabilities of the learning organization.

Disability	Before	After
I am my position.	<ul style="list-style-type: none"> job loyalty leads to job isolation and identification with one’s job: “I am a....” boundaries of one’s job limit vision and purpose of the job. 	<ul style="list-style-type: none"> integrated, not alone nor separated creative, not adaptive nor reactive interdependent, not independent nor dependent
The enemy is out there.	<ul style="list-style-type: none"> independent or dependent competitive external locus of control: “them” versus “us” 	<ul style="list-style-type: none"> interdependent cooperative internal locus of control: “...the enemy—they is us!”
Take charge!	<ul style="list-style-type: none"> emotional— “...don’t be a wimp!” taking aggressive action against an enemy “reactive” disguised as “proactive” 	<ul style="list-style-type: none"> metacognitive perspective thinking about how we contribute to our own problems as a system
Focus on events.	<ul style="list-style-type: none"> life is a series of events, each with one obvious cause emphasis on short-term events distracted from seeing patterns reactive to quick and sudden events 	<ul style="list-style-type: none"> life is a connected whole emphasis on long-term perspective seeing patterns creative, not reactive nor adaptive
I’m not hot—yet!	<ul style="list-style-type: none"> survival geared to sudden threats, not slow and gradual changes 	<ul style="list-style-type: none"> survival geared to slower, larger changes
I learn from experience.	<ul style="list-style-type: none"> limited learning horizon where we don’t directly experience the consequences of our actions failure to learn from systemic consequences of our decisions 	<ul style="list-style-type: none"> continuity of collective wisdom cross-functional analysis of complex, systemic issues over time
Our management team has the answer.	<ul style="list-style-type: none"> skilled incompetence fighting for turf protecting our “cohesive team” image squelching internal dissent diluting compromised decisions breaking down in a complex crisis we know the answer 	<ul style="list-style-type: none"> proficient at team learning collective inquiry into complex issues questioning policies, not problems we can find an answer together

Guidelines for Improving Organizational Learning

Introduction These guidelines derive from Peter M. Senge’s book about systems thinking, *The Fifth Discipline*. The focus is adaptive thinking about seven disabilities of some organizations. Think of “disability” as an organizational value.

Situation Apply these guidelines to overcome disabilities of the learning organization.

Disability	Guidelines
I am my position.	1.1 Integrate your work within a customer-supplier system—ask, “who is my customer, who is my supplier?” 1.2 Align your work purpose with organizational vision and purpose—ask, “why am I working, why are we organized?” 1.3 Think about your thinking, using analogy, metaphor, simile.
The enemy is out there.	2.1 Share power and gain new power — ask, “how can we learn to fish in a sustainable ecosystem?” instead of “can I have another fish now?” 2.2 Cooperate with customers and suppliers. 2.3 Post this slogan: The enemy is us!
Take charge!	3.1 Prevent, don’t remediate. 3.2 Think about how we contribute to our own problems — ask, “what are the slower, long-term effects of our actions?” 3.3 Post this slogan: Wimps don’t make problems, we do.
Focus on events.	4.1 Think about patterns and trends that you are seeing in the web. 4.2 Get past reacting and adapting to creating—ask, “what’s the big picture here and now?” 4.3 Post this slogan: We are now a living web.
I’m not hot—yet!	5.1 Back away from the living web in time and space — ask, “what’s the big picture look like over time?” 5.2 Simulate long-term interactivity within the living web with <ul style="list-style-type: none"> • an accelerated computer model, or • integrated observations over longer periods of time. 5.3 Post this slogan, Are we frogs boiling ourselves to death?
I learn from experience.	6.1 Provide easy and continuous access to collective wisdom within the organization. 6.2 Analyze complex, systemic issues across various functions and across extended time periods—ask, “how do others see this issue over time?” 6.3 Post this slogan: Our unexamined web of life is not worth weaving!
Management teams have the answers.	7.1 Question policies, not “problems”—ask, “how can we continually expand our capacity to create our future?” 7.2 Learn as a team, not alone — promote collective inquiry into complex issues. 7.3 Post this slogan: Together we can create our future.

Notes

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