

Tool: Learning Journey

Overview

Learning Journeys invite participants to step out of their daily routine and to experience places, people, and organizations that are relevant to issues they are working on. Learning Journeys allow participants to break out of established patterns and to experience circumstances and issues from a different perspective. Learning Journeys can also help build relationships with key stakeholders and provide a view of the system as a whole.

Application

Learning Journeys are used in the sensing phase of the U-process. Applications include:

- Innovation processes
- Leadership development
- Strategy processes
- Prototyping

Principles

- **Engage in three types of listening:**
 - Listening to others, to what the people you meet are offering to you.
 - Listening to yourself, to what you feel emerging from within.
 - Listening to the emerging whole, from the settings with which you are connecting.
- **Go to the places of most potential.** Meet your hosts in their context: in their workplace or where they live, not in a conference room. If you meet people digitally, invite your conversation partners to keep their webcams on.
- **Observe, observe, observe.** Suspend your voices of judgment (VOJ) and cynicism (VOC) and connect with your sense of appreciation and wonder.

Resources

- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapter 21. Oakland, CA: Berrett-Koehler.

Process

Setup

- **People:** We recommend ~5 people with a diversity of perspectives. Consider “extreme users”: people with a strong or specific need for the work or who lack easy access to the system.
- **Place:** Define places of high potential. Go to several places that can provide insights into:
 - innovations that push the system.
 - different perspectives of the system’s key stakeholders.
 - different aspects of the system.
 - the “voiceless” people in the system—those who are not usually heard or seen.
- **Time:** The length of a Learning Journey depends on the scope of the content being covered and the number of relevant conversations.
- **Materials:** If the hosts agree, take pictures and/or videos during the journey, or record portions of the online conversation. A pen and journal are required for taking notes.

Steps

Step 1: Identify the Journey

Select places, individuals, and organizations that provide new perspectives and insights.

Step 2: Prepare

1. As a group, discuss:
 - What is the context that we will experience?
 - Who are the key players that we will talk to?
 - What questions do we want to explore?
 - What assumptions do I/we bring with me?
2. Develop 7–10 questions to guide your inquiry. Update your list as your process unfolds.
3. Share the purpose and intent of the visit with the host. Communicate that it would be most helpful for the group to gain insight into their “normal” daily operations, rather than a staged presentation. Try to avoid “show and tell” situations.

Step 3: Your Learning Journey

1. Small groups travel to the host’s location or meet with the host virtually.
2. Asking simple and authentic questions is an important leverage point in shifting or refocusing attention to the deeper systemic forces at play.
3. Use deep listening as a tool to hold the conversational space. When your interviewee has finished responding to one of your questions, don’t automatically jump in with the next question. Attend to what is emerging.

Sample questions for Learning Journeys:

- What personal experience or decision brought you to your current role?
- What challenges are you confronted with? What opportunities?
- Why do these challenges exist?
- What challenges exist in the larger system?
- What are the blockages?
- What are your most important sources of success and change?
- What initiative, if implemented, would have the greatest impact for you? For the system?
- If you could change just a few elements of the system, what would you change?
- Who else in the system do we need to talk to?

Step 4: Personal Reflection and Debriefing

To capture and leverage the findings of your inquiry process, conduct a disciplined debriefing right after each visit. Remain focused on the activity: don’t switch on cell phones until the debriefing is complete.

Here are a few sample questions to ask yourself in the debriefing:

- What about the visit was most surprising or unexpected?
- What touched me? What connected with me personally?
- If the visited organization or community were a living being, what would it look and feel like?
- If that being could talk: what would it say (to us)?
- If that being could develop, what would it want to morph into next?
- What is the generative source that allows this social field to develop and thrive?
- What limiting factors prevent this field/system from developing further?
- Moving in and out of this field, what did you notice about yourself?
- What ideas does this experience spark for prototyping initiatives?

Step 5: Close the Feedback Loop

Send the host an email (or other follow-up note) expressing a key insight you took away from the meeting (1 or 2 sentences) and your appreciation.

Step 6: Whole-Group Debriefing

- Get everyone on the same page by sharing concrete information about the Learning Journey: Where did you go, who did you talk to, what did you do?
- Talk about your findings and generate new ideas.
- Bring original quotes / “voices” into the space.
- Engage in a generative dialogue.