

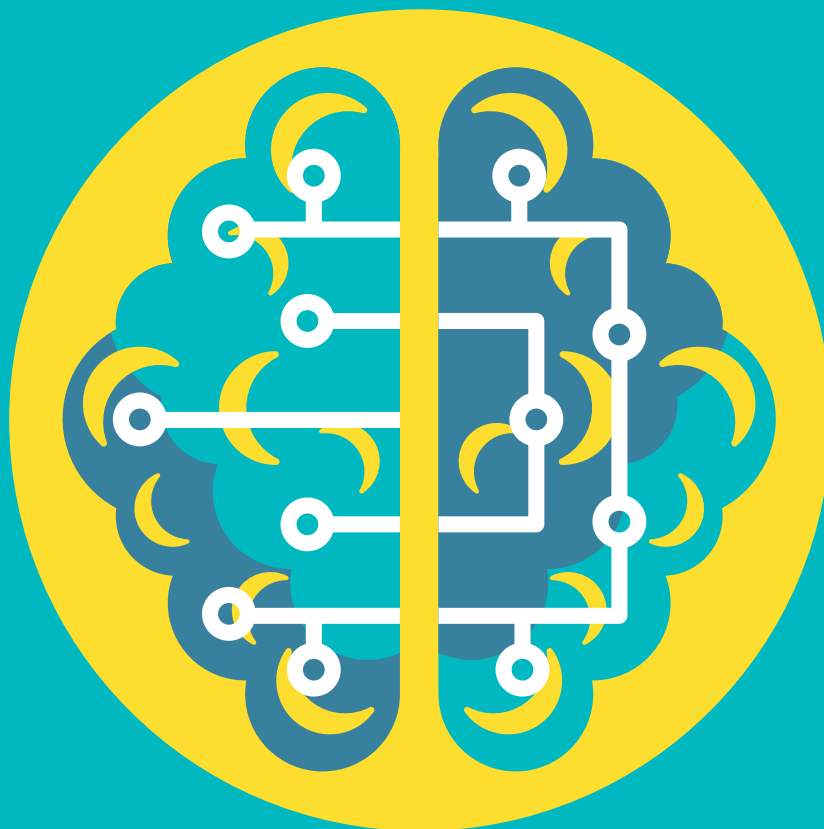
A GIBS IMPACT PAPER

# ACTION LEARNING COACHING AT GIBS - AN IMPACT REPORT -

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Themes of leadership results and  
organisational results

RIKA TOME WITH INPUT FROM JOHN THOMPSON

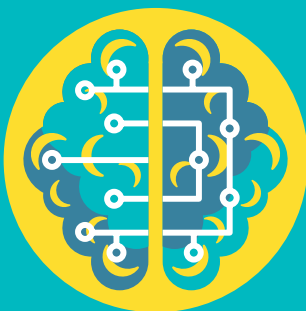
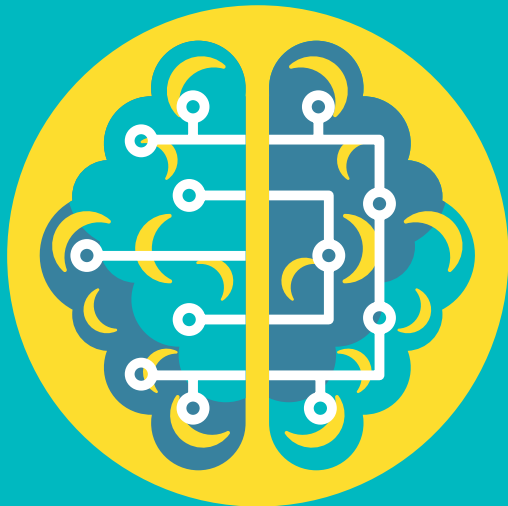
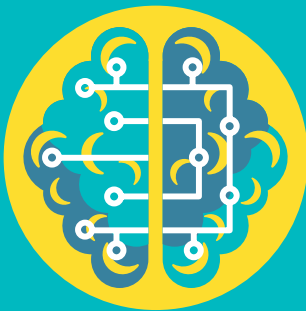
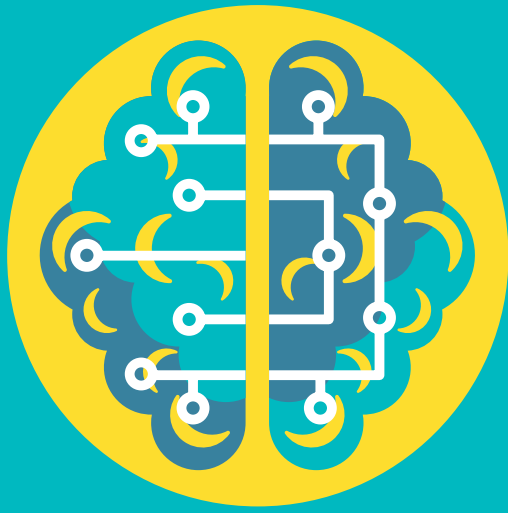


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JULY 2022





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# GIBS

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# Abstract

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This paper outlines the impact of action learning using case examples at the Gordon Institute of Business Science (GIBS). It also describes the possible benefits if the process is implemented effectively. Research indicates that escalating complexity is a major theme in business today, which amplifies the need for leaders to think and solve problems differently as well as to adapt to change more seamlessly. As a result, organisations increasingly search for initiatives that not only effectively increase agile leadership by means of leadership development, but also have organisational impact to help them navigate through uncertainty.

The major focus of this paper is to outline the impact of action learning in specific organisations where GIBS action learning initiatives have been implemented. Moreover, this paper details what action learning at GIBS entails and defines the concept, highlighting the benefits and motivation for its use. In addition, this paper stresses the critical success factors identified by organisational experts that are deemed necessary to ensure successful action learning design, delivery, and impact. A framework for designing action learning effectively is also provided, based on historical data from successful action learning initiatives as part of leadership development programmes at GIBS.

GIBS clients who have used action learning effectively and could comment on leadership learning and organisational impact were used as examples to extract data. The clients referenced in the paper are Anglo American, Komatsu, Aspen, and AECL. Learning and development and human resources staff at the organisations, as well as programme managers and action learning coaches were interviewed to obtain data.

The information in this paper may be useful to those involved in learning and development, human resources, and talent development, as well as organisational development and growth. The anticipated value of the paper is to illustrate the impact of action learning processes by providing examples of effective action learning delivery, to offer insight into why organisations may exclude action learning as part of leadership development programmes, and to offer a framework for the impactful design delivery and evaluation of action learning initiatives.

**The major focus of this paper is to outline the impact of action learning in specific organisations where GIBS action learning initiatives have been implemented.**



## 1. Introduction

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Organisations are continuously trying to navigate transformation due to disruption, which has been exacerbated in part by the COVID-19 pandemic since 2020. This has caused accelerated digitalisation as well as various other transformational changes. Some leaders have excelled, while others have struggled to adapt.

The following extract, from research done among executives and business school deans in March 2021, highlights the need for adaptable and agile leadership in an increasingly volatile world that is uncertain, complex, and ambiguous (VUCA):

The whole concept of the [VUCA] world, the volatility and the uncertainty, it is many-faceted now. And many leaders have been caught flat-footed. So many little organisations have closed because the leaders just couldn't see a new way of doing things. In one fell swoop, their business was gone. The business model was suddenly non-existent. We as business leaders need a radical new think. (Lodestar Marketing Research, 2021, p. 20)

Escalating complexity is a major theme in business today (Van der Veen & Reid, 2021), which amplifies the need for leaders to think and solve problems differently as well as to adapt to change more seamlessly. Challenges associated with continuous adaptation are not new. Harvard Corporate Learning (2020) found that continuous adaptation put pressure on leaders to do things differently. Therefore, organisations will have to re-examine their leadership development strategies to remain relevant and maintain a competitive edge. Remaining relevant in continuous change necessitates organisations to explore the best way of developing the critical capabilities and skills needed to lead effectively in future. Leading into the future can be summarised as per Table 1.

	Business priorities	Leadership requirements	Development implications
<b>Question the past</b>	Large dedicated office spaces, fixed strategies, and top-down decision-making	In-person management, clear work-life balance, and unconscious bias	Fixed learning strategies and slow adoption of new tools and methods
<b>Manage the present</b>	Build resilient supply chains, better use capacity; and get efficient and agile	Focus on employee wellness and safety, cultivate resilience, and build trust	Ensure learning continuity and help leaders to communicate and connect
<b>Create the future</b>	Develop iterative strategy, accelerate digital, and diversify talent pool	Continuously reassess and adapt strategy, and cultivate and leverage inclusivity	Broaden learning access and create immersive experiences in the flow of work

**Table 1: Leading into the future**  
Source: Adapted from Govindarajan (2016)

Consequently, what will this mean for organisations that may want to equip future leaders effectively for a VUCA world? Human resources (HR) or learning and development divisions may ask some of the following questions:

- Are your organisation and leaders ready to create the future?
- What emerging capabilities and skills will they need that they may not have right now and what will assist them?
- Are there existing initiatives that can assist?

One of the initiatives that may benefit future leaders to build new skills and capabilities while simultaneously impacting the business is action learning (often structured as action learning processes/projects [ALPs]).

## 2. What is action learning?

According to Marquardt et al. (2018), action learning is:

“A powerful problem-solving tool that has the capacity to simultaneously build successful leaders, teams, and organisations. It is a process that involves a small group working on real problems, taking action, and learning as individuals, as a team, and as an organisation while doing so. (p. 4)”

ALPs are aligned to organisational strategy and are endorsed and guided by executive or senior management sponsors. The project/process combines the application of learning with the opportunity to ask questions and reflect on learning and its team applications. The outputs are a report and a presentation to faculty and company executives, which include recommendations, a business case, and an implementation plan. While the focus is on applying learning, new insight, and the combined thinking skills of a team of leaders, learning from top faculty input is still at the heart of the education journey. Without insight – for example, into marketing, operations, and finance – the process adds no value. When combining theory and examples of best practice in the project application, learning is maximised.

Therefore, ALPs are processes of learning by reflection and active application, usually during a leadership development programme. They are conducted as individual or group projects pertaining to a business challenge, problem or opportunity, where the outcomes focus on personal learning and business impact.

Marquardt et al. (2018) noted that organisations are increasingly using action learning because of its unique ability to address some of the greatest leadership challenges in a VUCA world.

These challenges include:

- The increased complexity of organisational challenges;
- A growing need for new leadership attributes and capabilities;
- The increased importance of effective, high-performing teams;
- A greater need for continuous individual, group, and organisational learning; and
- An expanding need to develop a coaching mindset and skills.

Considering action learning's value on learning and business, two measures are used, namely return on investment (ROI) and return on learning investment (ROLI). Thompson (2018) noted that ROLI is a measure of behaviour change that, when applied to business challenges, delivers improved individual, team, and organisational performance. The ROLI is based on the original work of Kirkpatrick (1993), which evaluates learning at four levels: reaction, learning, application (behaviour), and business impact. ROI can be measured as the financial benefit of the implementation of project recommendations minus the costs. Organisations that want to benefit from action learning may consider one or both of these measures to determine impact.

GIBS has used action learning successfully to develop leadership capability across businesses in South Africa and Africa. Thompson (2018) described the adopted learning approach with the major stipulation that learners acquire new knowledge, attitudes, skills, and experiences they can apply at work to improve the organisation. He added that action learning improves business performance as well as ROLI. “Agile leaders develop the skills that allow organisations to move to a position where the pace of learning matches or exceeds the rate of change in the VUCA world of business” (Thompson, 2018, p. 3).

# 3. Action learning at GIBS

## 3.1 The impact of GIBS action learning programmes in organisations

ALPs at GIBS have historically impacted individual, group, and organisational learning. Various client organisations have successfully used action learning to equip leaders with skills and knowledge, influence leadership behaviour, and find possible solutions for organisational challenges. Past programmes have typically impacted individual learning, learning in groups, as well as organisational shifts and growth. Although different models have been used and some of the programmes utilised either a full or partial ROI assessment, when assessing impact, some similarities are highlighted across programmes. A multitude of historic GIBS programmes exist, but the following four programmes are highlighted due to evidence, recency, and action learning models:

- **Anglo American Programme for Management Excellence (PME) (2008–2018);**
- **Komatsu (2020–2021);**
- **Aspen (2014–2017); and**
- **AECI (2018–2020).**

Some of the individual and organisational impact from these programmes is summarised in the subsections that follow.

### 3.1.1 Individual leadership impact themes

Table 2 outlines how individual leadership learning has been impacted across the programmes. Some of the quotations from the interviews conducted with the Anglo American, Komatsu, Aspen, and AECI learning and development and HR staff are included in the table.

Individual leadership impact/learning	Anglo American	Komatsu	Aspen	AECI
<b>Cognitive</b>				
Improved ability to analyse situations: Anglo American: “Delegates are encouraged to find a project in their own areas of work.”	Yes	Yes	Yes	Yes
Improved leadership ability	Yes	Yes	Yes	Yes
Improved ability to think more strategically	Yes	Yes	Yes	Yes
Improved scenario planning to find solutions	Yes	Yes	Yes	Yes
<b>Execution</b>				Yes
Improved insight into the business: Komatsu: “I learnt more about the company over the last nine months than in the previous 22 years.”	Yes	Yes	Yes	Yes
Improved project management ability	Yes	Yes	Yes	Yes
Improved ability to execute	Yes	Yes	Yes	Yes
<b>Relational</b>				Yes
Improved knowledge about diversity and how to manage it in teams: AECI: “Collaboration is important to lead effectively.”	Yes	Yes	Yes	Yes
Improved ability to influence and manage teams: Aspen: Some delegates found their “leadership voices” to enable application of learning and have courageous conversations.	Yes	Yes	Yes	Yes
Improved people development ability	Yes	Yes	Yes	Yes
<b>Self-management</b>				Yes
Improved confidence and assertiveness: Komatsu: “There truly is strength in diversity, we have all grown both emotionally and innovatively, great year.”	Yes	Yes	Yes	Yes
Personal insight and awareness: Aspen: Comments concerned the ability to have courageous conversations, to manage conflict more effectively, to lead from any chair despite the leadership position, to learn to manage peers and navigate diversity in a team, increased self-awareness and self-knowledge to enhance emotional intelligence, increased confidence, to build and increase networking abilities, to increase the ability to be more strategic and less operational, to be more resilient when dealing with change while being more comfortable with ambiguity, and to learn to be more collaborative.	Yes	Yes	Yes	Yes
Changed behaviour as a result of learning: AECI: “The challenges encountered during the duration of this journey have given us insight into overcoming challenges.”	Yes	Yes	Yes	Yes
Improved willingness to explore areas outside their expertise – linked to agility and resilience to change: Komatsu: “My biggest takeaway is never to be afraid to ask colleagues uncomfortable questions.”	Yes	Yes	Yes	Yes

Table 2: Individual learning as a result of action learning projects

When comparing the individual leadership impact across the four example programmes, leadership learning aligns well with some of the needs current organisations have for leaders to question the past, manage the present and create the future. The themes noted are comparable to leadership skills as a result of action learning, as Leonard and Lang (2010) highlighted – namely cognitive, execution, relational, and self-management.

### 3.1.2 Impact on organisations

To compare the effect of ALPs on the programmes, it is important to note that all programmes assessed the impact action learning had on the businesses, although there were differences related to the levels of ROI assessed and the models used to evaluate this impact. Anglo American assessed the ROI by using the Phillips ROI methodology (Phillips & Phillips, 2012) and measured the full programme including various ALPs. Aspen, Komatsu, and AECI ran

various ALPs, but the measure of assessing impact for the purposes of this paper relates to specific projects. Aspen, Komatsu, and AECI all reported impact, but did not use the Phillips model in its totality at all six levels of assessment. Table 3 outlines the time periods, project descriptions, assessment methods, and programme/project impact on each programme.

2008-2018



#### Project/Programme background

The PME: 10 years – 1 500 delegates having attended

#### Project description

Full scale of PME projects in 2011

#### Method/model of assessment

Phillips ROI model: Levels 1–6

#### Project results

Various projects in 2011 mainly showed improvement in business processes to improve efficiency, safety, and production.

##### Business impact assessed

The 2011 survey compares the PME benefits to the costs. This is assessed by comparing the annual investment in the PME to returns delivered by means of PME projects.

For 2011: ROI – A ratio of 4.2 to programme investment.

Future projects estimated a possible value with an ROI of up to 22.8, such as the Backlog Reduction Project, which estimated a reduction of R310 million in Life of Mine Backlog liability between 2012 and 2021. Tangible ROLI and ROI

##### Learning assessed

The programme focused on “return on learning” as well as a financial return. In the 2011 study, in terms of progress in Personal Development Plan objectives, 88% of managers and 98% of participants indicated tangible improvement in their People-Development-Way leadership objectives.

##### General feedback about the programme/project

M. Trollope (personal communication, June 11, 2021), the previous learning and development manager, stated: “The action learning projects deliver enormous value to the company. The delegates are encouraged to find a project in their own areas of work. This ensures ownership and the drive to implement in their respective areas. Just looking at the implementation and value-add from the implementation of action learning projects provides us with an impressive ROI on learning.”



2020–2021



### Project/Programme background

Management Development Programme (MDP) followed an executive development programme: two years – 26 successful delegates completed in 2020. Action learning is at the core of the programme.

### Method/model of assessment

ROI level 5: Tangible ROI

### Project results

A potential saving of R245 million (over a three-year period) in inventory was identified. Strategic fit was important as part of the project.

The impact results were to:

- Reduce operational inefficiencies;
- Streamline planning and marketing processes to improve inventory requirement forecasting;
- Develop an external supplier to use obsolete stock and provide support for legacy machines;
- Develop key performance indicators for planners to keep track of the inventory requirements and performance;
- Initiate an inventory awareness campaign; and
- Improve the supply-and-demand forecasting strategy to improve procurement decision-making processes.

Time period for implementation: Six to 36 months. The overall expected results were a 26% drop in inventory, with a large part realised from excess stock sales.

The project timing was planned over 18 to 24 months. This one project, when measuring business impact, will be sufficient to pay back the entire programme investment when it is completed, which shows enormous business impact.

### Project description

**2020 project:** Optimising inventory was guaranteed to deliver huge impact while reducing the inventory holding. For the company to remain profitable, the supply chain needed to be optimised such that the material flow is matched with the production process. On-time delivery of components is critical in ensuring that production schedules are adhered to and thus customer satisfaction can be achieved. Joy Global (Africa) currently maintains inventory in excess of R960 million. A reduction in its inventory holding would lead to a significant boost in liquidity.

### Business impact assessed

- Reduce operational inefficiency
- Streamline processes to improve forecasting and planning
- Improve decision-making processes
- Develop performance system
- Improve supplier network
- Tangible ROI

### Learning assessed

Learning at ROI level 2 was not formally assessed according to the Phillips ROI model. However, informal individual leadership themes are indicated in the table.

### General feedback about the programme/project

B. Isaacson (personal communication, June 11, 2021), the ALP coach, shared: "The one learning piece of feedback that struck me most was one of the delegates who mentioned that he learnt more about the business during the action learning project than in the 22 years that he has been in the business."



2014–2017



## Project/Programme background

- 2014–2017:** 122 Middle MANAGEMENT Development Programme (MMDP) managers
- 2017:** 25 first-line managers
- 2020–2021:** New leadership development programme launched – 47 MMDP leaders and 27 first-line managers
- 2014–2015:** Aspen also trained 36 women in a women-in-leadership programme

## Project description

**2016 MMDP project:** Aimed at a zero-waste-to-landfill objective

Previous significant improvements in waste recycling in SA did not include waste reduction and the establishment of landfill-free targets (“Zero waste to landfill”) by way of waste reduction and alternative waste management treatment technologies were identified as an innovative opportunity. The goal was to divert waste from landfills by making the nutritional facility in South Africa the first landfill-free manufacturing site in the country’s operations.

## Method/model of assessment

**ROI level 4:** Business impact

## Project results

All objectives were successfully implemented. The following milestones were reached:

- Aspen Nutritionals declared the first landfill-free facility in Aspen SA Operations;
- An intensity target for waste (0.1114 kg waste/kg product) established for FY2016 at the Aspen Nutritionals plant to integrate waste reduction goals and business plans, and the results for the first quarter (July–September 2015) were well within the threshold;
- A waste reduction programme (14% per annum) for cardboard waste, currently recycled, was implemented, and a 6-ton reduction target achievement was expected by year end (June 2016); and
- Three-phase plans targeted to achieve zero waste to landfill in a 12-month period were approved for the pharmaceutical operations (Port Elizabeth [now known as Qqeberha] and East London).

## Business impact assessed

- Reduce operational inefficiency by means of carbon footprint reduction
- Improve goal achievement of waste reduction

## Learning assessed

Learning at ROI level 2 was not formally assessed according to the Phillips ROI model. However, informal individual leadership themes are indicated.

## General feedback about the programme/project

S. Essop (personal communication, June 14, 2021), the group head of HR services, asserted: “Although tangible results are sometimes difficult to measure, the programme had an impact on people’s self-awareness and leadership.”

2018–2020



### Project/Programme background

**Since 2017:** MMDP and Senior Management Development Programme SMDP programmes: 12–18 months

**2018–2020:** 78 MMDP delegates

**2018–2020:** 32 SMDP delegates

### Project description

**2019–2020 SMDP project:** Aimed at developing a strategy to build a sustainably conscious AECI through in-house and external recycling, water reuse, waste reduction, and/or controlled carbon emissions

The Nitrates facility at AEL and the operations at IOP as case studies and proposed pilots to: 1) demonstrate the impact of any one of the 3Rs (reduce, reuse, recycle); and 2) foster a sustainability mindset that could be rolled out to the AECI Group.

### Method/model of assessment

**ROI level 4:** Business impact

### Project results

With a savings potential of R3.86 million per annum by reducing the amount of water used in the AEL Nitrates manufacturing process to historical average consumption levels, this facility could set the example for businesses to look for efficiencies based on the 3Rs. The project at IOP that involved reducing energy consumption by means of recycling efforts with an annual return of approximately R430 000 and a return on assets within three years was identified.

### Business impact assessed

- Streamline business processes to improve efficiency
- Tangible ROI

### Learning assessed

Learning at ROI level 2 was not formally assessed according to the Phillips ROI model. However, informal individual leadership themes are indicated.

### General feedback about the programme/project

Y. Jacobs (personal communication, June 8, 2021), the group learning and development specialist, had the following to say: “The programme impact[ed] leadership awareness and management.”

**Table 3: Organisational impact as a result of ALPs**

# 4. How to implement action learning as a successful initiative for learning and impact



## 4.1 The action learning process

GIBS's approach to action learning has evolved from initially utilising "pure action learning" to using various forms of action learning depending on clients' needs. Despite several approaches, an effective process and other critical success factors were identified as common across projects to ensure effective delivery, impact, and continuous delegate learning.

Delegates – in groups or individually – apply programme learning, case studies, and benchmarking immersions in local or global communities or businesses as part of a project. The outcomes of the project are described in a report defining the project, the research methodology, an analysis of the data collected, recommendations, and a business case for the preferred recommendation(s). In addition, an action plan outlines the possible implementation or the results thereof if a solution was implemented. A presentation depicting the problem or opportunity, methodology, findings, business case, and potential alternative solutions is often required to offer executives in the organisation the opportunity to evaluate learning and action involved.

At their core, GIBS'S ALPs have:

- The application of classroom learning;
- The application to a business problem;
- An expert coaching guide; and
- Alignment to the strategic intent of the organisation.

According to Thompson (2018, p. 5), the ALP is based on:

Challenging assignments that are carried out by teams or individuals and result in the application of learning back at work. The logic is that by linking formal content from a specialist to the right sorts of questions, the learning outcomes are powerful and will inform and drive action. In the Action Learning team, the "comrades in diversity" learn not only from programme input, but also from the dialogue shaped by questions that elicit new insights. The members of the team reflect on what is happening in the process, build theory around what they have seen and experienced, and then test what has been learnt in practice.

The process is based on the new insight that leaders develop through reflective questions, while not necessarily relying on previous knowledge or preconceived ideas of the answers to complex organisational challenges. The objective is to equip leaders with new skills, while finding alternative solutions to organisational challenges. Organisations often expect leadership development programmes at GIBS to:

- Assist leaders in learning (equip leaders with new skills or knowledge);
- Assist leaders to apply new learning in their business environment, do things differently, and be confident; and
- Impact and add value to the business performance of the organisation through the application of new learning.

Action learning's objective is to meet these challenges to contribute to leadership agility and to assist organisations in continuously learning and improving. Individual and group learning as part of action learning can impact the value added to organisations.

## 4.2 Other critical success factors

The common critical success factors across organisations, which were identified through interviews with key people, are portrayed in Table 4. The table outlines factors for ROLI and ROI.

FACTORS	ROLI	ROI
<b>Organisational factors</b>		
Effective sponsors	x	x
Supportive learning environment	x	x
Support from the Executive Committee	x	x
Line management involvement/ownership	x	x
Delegates aware of strategic motivation for projects	x	x
Ensuring the right leaders are chosen	x	x
Project challenges crafted in conjunction with senior leaders	x	x
Guide the formation of teams	x	x
Baton passed from the project team to the steering team	x	x
Effective HR to set milestones/have regular touchpoints even beyond the programme	x	x
Access to accessible reliable organisational information	x	x
Availability and access to necessary resources	x	x
Access to organisational subject matter experts	x	x
Stable organisation with learning culture	x	x
<b>GIBS programme factors</b>		
Ensure organisation knows what type of ALP it needs	x	x
Effective ALP coach	x	x
Clear measures of what level of ROI assessment is needed		
Clear brief to delegates and sponsors	x	x
Effective communication with sponsors and delegates throughout	x	x

Table 4: Critical success factors contributing to successful ROLI and ROI

## 4.3 Action learning projects and return on investment evaluation

Depending on the measures determined by the client ahead of the ALP and the identification of the need for ROI evaluation, the framework (Phillips ROI model) depicted in Figure 1 can

be considered in the design. Nevertheless, the critical success factors in Table 4 should be considered before deciding which model to use when assessing ROI and/or ROLI.

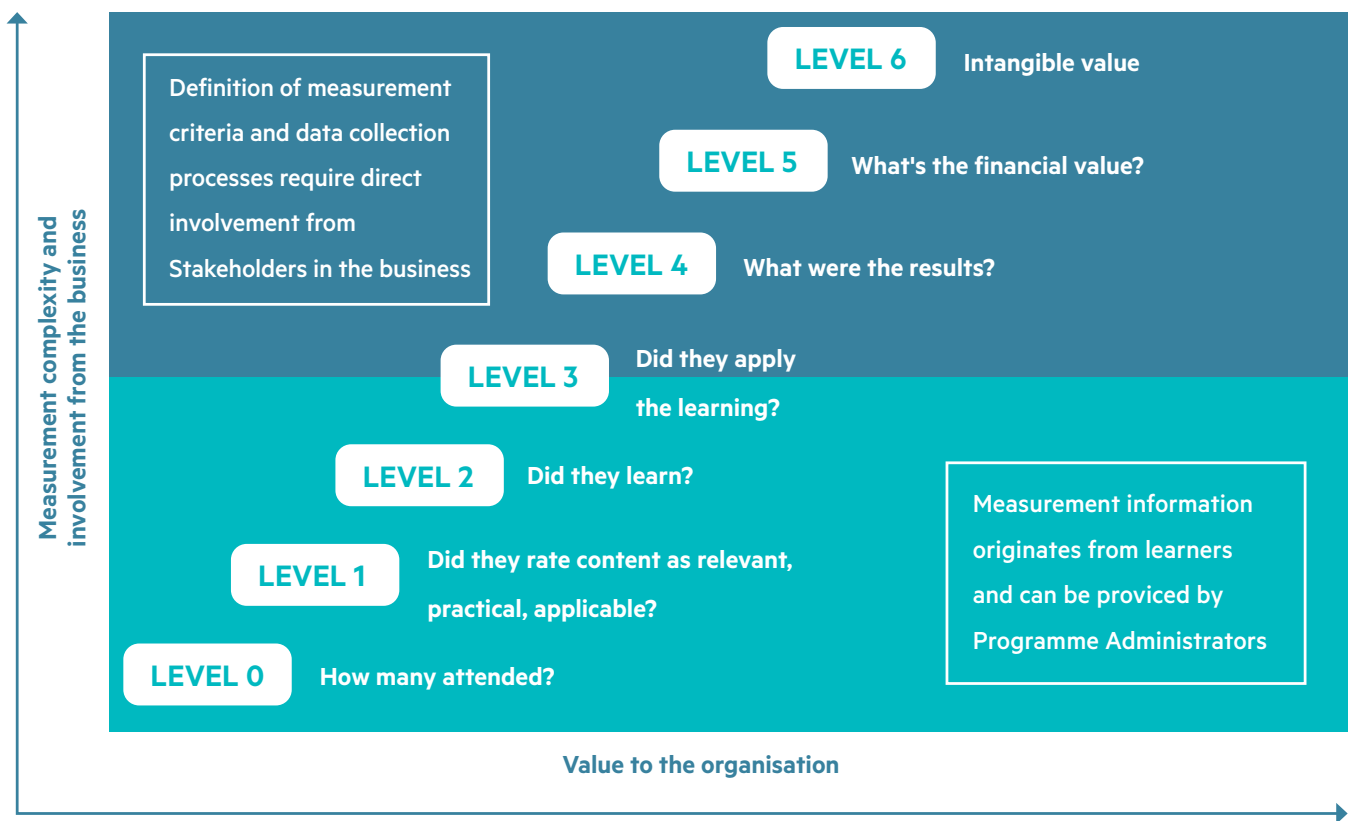


Figure 1: Phillips ROI model (modified from Phillips & Phillips, 2012)

## 4.4 Why organisations sometimes exclude action learning

Despite being a powerful, versatile process, not all organisations have opted to include action learning in their leadership development journey. Table 5 lists the possible reasons why organisations exclude action learning, based on interviews with various stakeholders at GIBS and client organisations.

Reasons for excluding action learning	Description
Balancing order and chaos in action learning	Marquardt et al. (2018) noted that optimising the power of action learning requires balancing both order and chaos. Not all organisational cultures allow for this balance.
Continuous reflective learning and inquiry	Continuous reflection may take time that some leaders who only focus on quick action/results may not be open to.
Comfort with ambiguity	If leaders are uncomfortable with uncertainty, the process may be inefficient in that culture.
Not only about learning, but also about action and execution	If leaders are only interested in learning without execution, the process may be ineffective.
Investment of time and cost	Not all organisations are willing to invest sufficient time and money for an effective process.
ROI	ROI is sometimes intangible if solutions are not implemented. Some organisations have a need for quick, tangible returns that may not be viable.
Learning organisations	Learning organisations are organisations that continuously learn and improve to successfully adapt. This requires learning at individual, group, and organisational levels. Learning at all three levels may not be viable due to organisations not being ready or open.

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# Conclusion

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It is evident that action learning can play a profound role in individual leadership development through learning, while simultaneously impacting on organisational development and progress business results. Individual learning can include the development or improvement of cognitive, relational, execution, and self-management skills, which are critical skills for future leaders wanting to navigate through continuous change in an agile manner while being resilient. Organisational impact includes, but is not limited to, an impact on businesses with the emphasis on improving business processes, reducing business inefficiency, improving supplier networks, improving decision-making processes, improving performance processes, executing/achieving personal development goals, and improving planning and forecasting, which can result in a ROI.



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