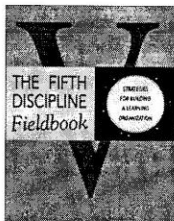# The Fifth Discipline Fieldbook: A Guide to the Learning Organization

by W. Brian Kreutzer

The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization

Edited by Peter Senge, Charlotte Roberts, Richard Ross, Bryan Smith, and Art Kleiner

Jorge Valchez is an organizational development consultant at International Chocolate, Inc., a (fictional) confectionery company. A few years ago, he picked up a copy of *The Fifth Discipline* by Peter Senge and became very excited by the concept of the learning organization. Inspired by the book, he tried to create some momentum for change in his organization. Although he had some success in beginning new conversations, he ran into difficulty when he tried to implement the tools and ideas on his own, so the program really never got off the ground. Four years later, after receiving a copy of the just-released follow-up—*The Fifth Discipline Fieldbook*—he wondered if this new resource might help him try once again to transform his company into a learning organization.

Starting with the Basics

Jorge began his exploration of *The Fifth Discipline Fieldbook* by looking for an exercise that could help him better understand how to create a learning organization. He found a "solo exercise" entitled "Defining Your Learning Organization" (p. 50). Following the instructions, he began envisioning the learning organization he would like to build. To do this, the exercise suggested answering three questions about this ideal organization: 1) What are the characteristics of this organization that make it succeed? 2) How do its people interact inside the organization and with the outside world? 3) How does this organization differ from my current organization?

When Jorge completed the exercise, he was enthusiastic about his personal vision of what a learning organization would look like. Since he had heard the phrase "shared vision" tossed around the office, he decided to share his vision with the other members of his organization. He picked up the book once again to look for suggestions.

His search brought him to an article entitled "Building Shared Vision: How to Begin" (p. 312), one of the "Theory and Methods" entries in the book. The article described five stages in the process of building shared vision, and suggested first determining your current stage, and then designing a strategy to get you to the next stage. With help from the *Fieldbook*, Jorge determined that his company was at stage two ("selling" the vision), and to further the work he should focus on enrolling people in the vision by sharing his personal excitement and commitment. Based on the suggestions in the book, he plotted a course of action.

Creating a Vision

Some weeks later, Jorge picked up his tattered copy of *The Fifth Discipline*

About the *Fieldbook*

With the publication of *The Fifth Discipline* in 1990, Peter Senge popularized the concept of the learning organization. This management best-seller broke new ground in organizational change by describing the component technologies and disciplines of the learning organization. Now *The Fifth Discipline Fieldbook* picks up where *The Fifth Discipline* left off, describing how companies are using the tools and technologies of the five disciplines to make the learning organization a reality.

Modeled after the *Whole Earth Catalog*, the *Fieldbook* is a collection of essays by over 70 contributors. It is meant to be used as a working reference guide: wide margins allow the reader to make notes and draw loops, and icons in the margins delineate the different types of entries (Solo Exercise, Team Exercises, Guiding Ideas, Infrastructure, Theory and Methods, Cameo, Lexicon, Systems Story, Tool Kit, and Resources), enabling the reader to scan quickly for items of interest.

The *Fieldbook* follows the outline of *The Fifth Discipline* with a chapter devoted to each discipline, but is supplemented by exercises, discussion, and practical examples of strategies readers can use to apply the tools. Each section ends with a short essay and suggestions for where to go next.

Like any true reference book, the *Fieldbook* is designed to be used in many different ways—heavy cross-referencing makes it easy to skip among related exercises and case studies, but it can also be read cover to cover. Perhaps its greatest value is the vast collection of resources that are sprinkled throughout the book. At almost 600 pages, it is a bit cumbersome for a field guide, but true students of the learning organization won't begrudge the authors a single page.

—Colleen Lannon-Kim

Fieldbook. He felt his work group was now at the stage where the members were ready to co-create a vision. One intriguing phrase he came across said, "When a shared vision effort starts with personal vision, the organization becomes a tool for people's self realization, rather than a machine they're subjected to." When he shared this passage with the other members of his group, he was asked, "How do we do this?"

After skimming through the book, Jorge stumbled upon a "Guiding Ideas" article entitled "Intrapersonal Mastery" (p. 226), which stated that personal mastery involves a move from reacting to the past to creating your future. As this shift happens, you often realize that you are intimately related to your organization, your nation, and the world. Along with this realization comes the desire to adjust your personal vision so that it encompasses not just what you want for yourself, but what you want for the larger systems in which you work and live.

Jorge immediately wrote up a presentation on intrapersonal mastery and presented it to his group. The meeting, however, was a disaster. He was constantly interrupted, people seemed to react to things that weren't said, and there was a lot of posturing. Afterward, he met with each of the members individually to get their impressions of what went wrong, and to re-emphasize his belief in the importance of intrapersonal mastery. To his surprise, each team member expressed excitement and interest in the topic. He wondered how they could possibly agree with him individually and yet act so unproductively in a group setting. It seemed that his group also needed to work on team learning.

That evening he picked up his *Fieldbook* and found another "Theory & Methods" article in the Team Learning chapter (p. 357). The article was on dialogue, a process through which people learn how to think together by creating a "container"—an atmosphere of trust and respect in which difficult topics can be addressed. After reading about dialogue, Jorge invited the other members of his group to come to a series

The *Fieldbook* at a Glance

Getting Started introduces the concept of a learning organization. What does one look like? How and why should you create one? What is the role of the leader? And how do individual learning styles affect the creation of a learning organization? This section also explains the format of the book and offers suggestions for how to use it most effectively.

The **Systems Thinking** chapter begins with a case study and accompanying articles that describe the four different ways of looking at a problem (events, patterns of behavior, systems, and mental models). A great deal of space is devoted to explaining the archetypes, with guidelines on how to use them for diagnosing problems. This section ends with an essay discussing the limitations of archetypes and an explanation of why computer modeling is the next step for gaining understanding of a system.

The **Personal Mastery** chapter begins with an exercise on personal vision. It's followed by several tips on how to become a good vision coach for others, and how to link your vision to your organization's. Other essays discuss how to get in touch with your personal values and describe the process of revisiting your personal vision. This section ends with case studies showing how various companies have implemented personal mastery at the workplace.

Mental Models are the "images, assumptions, and stories which we carry in our minds of ourselves, other people, institutions, and every aspect of the world." This chapter includes a number of tools for surfacing these mental models— the "Ladder of Inference," the "Left-Hand Column" exercise, scenario planning, and double-loop accounting—that provide an opportunity to clarify your thinking and more clearly understand the thinking of others. Other essays discuss how to balance inquiry with advocacy and look at issues from multiple perspectives, and how scenario planning was used at Royal Dutch Shell to accelerate learning.

The **Shared Vision** chapter describes the process of creating shared meaning and achieving articulated goals. Bill O'Brien, former CEO of Hanover Insurance Co., discusses the process his company went through to create its governing ideas. Another article describes the various starting points for building shared vision and the strategies and activities that are appropriate at each step. Several team exercises in this section offer ways for groups to define a common vision and purpose.

The **Team Learning** section begins with several essays on the process of dialogue, along with a case study showing a dialogue session in action. Other entries discuss techniques for improving the effectiveness of meetings and suggest ways to evaluate your progress. Additional offerings in this section include dealing with issues of diversity, the contribution of unique learning styles in a team setting, and the applicability of family systems therapy to group dynamics. The final essay describes the opportunities and challenges that result when shifting from individual leadership to team leadership.

The **Arenas of Practice** chapter is composed of essays that show how organizational learning tools are being applied in various areas such as Total Quality programs, corporate environmentalism, training, and workplace design. The learning tools are shown in action in a number of diverse settings—family-owned businesses, newspapers, hospitals, schools, communities, and governments.

Frontiers showcases new directions that are being pioneered and demonstrates how some organizations are pushing the organizational learning envelope.

The **Endnotes** section includes some final thoughts by Peter Senge, as well as an invitation to all readers to share their experiences as they transform their company into a learning organization.

of meetings to begin experimenting with the dialogue process.

After they met a number of times in dialogue sessions, Jorge felt like they were beginning to reach a new level of understanding and communication. At this point, he presented the group with a team exercise from the *Fieldbook* entitled "What Do We Want to Create?" (p. 337), which offers a two-step method for jointly articulating a shared vision and evaluating current reality. After doing this exercise a number of times, they felt comfortable with the shared vision they created.

Looking at the System

The group agreed that the next step was to design a method to achieve that vision. Jorge knew that before you change the structure of a system, you better know what you're doing or you could make it worse. He decided that it would be a good idea to map out the structure of the system using system dynamics' causal loop diagramming technique. A "Systems Stories" article in the *Fieldbook* entitled "Start with Story Telling" told of a company like his that used systems thinking to move from focusing on events to recognizing patterns of behavior over time. They then mapped out the mental models of the company's managers so they could see the systemic structure underlying their problems. Jorge and the other managers decided that they would attempt to do the same.

Using the archetype family tree in the *Fieldbook* (p. 149), they identified the "Shifting the Burden" archetype as best capturing one of their most persistent problems. It seemed to Jorge's group that at International Chocolate, managers spent much of their time "fighting fires"—even though they all recognized the havoc and the short-term perspective crisis management engenders. Using the storyline of the "Shifting the Burden" archetype from the *Fieldbook*, the group saw that a dependence on crisis management had led to addictive behavior in the company as a whole. As the team began to flesh out the storyline, they soon developed a free-form causal loop diagram that accurately reflected their shared view of

their problem. But although they all agreed on the structure of the system as represented in their causal loop diagram, they disagreed about the behavior that system would produce if they tried to change the addictive structure.

As Jorge was puzzling over this latest dilemma, he noticed a cameo article in the *Fieldbook* by John Sterman entitled "Beyond Training Wheels" (p. 177), which discussed the shortcomings of archetypes and causal loop diagrams. Jorge and his team discovered that they were not alone in being unable to mentally "simulate" the solution to the problem they had mapped, and that in order to do this they needed to convert their causal loop map to a mathematical model.

Although the *Fieldbook* contained several articles on converting causal loop diagrams to computer models, Jorge felt that it was not nearly as rich in this area as it was in others. It did, however, point to and review many modeling resources that Jorge could pursue for using system dynamics to create mathematical models and test their systems hypothesis (p. 546).

Next Steps

Jorge is currently busy finding a consultant to help build a computer model. Although he is not using the *Fieldbook* quite as much at this stage, he keeps it on a shelf next to his desk because he knows he'll pick it up again soon. Jorge has learned that building a learning organization is a continuous process, and despite their progress, his company still has a long way to go. ⬛

W. Brian Kreutzer is a consultant, teacher, and writer associated with Gould-Kreutzer Associates, Inc.

The Fifth Discipline Fieldbook (New York: Doubleday, 1994) is available through Pegasus Communications, Inc.

The Best of the Fieldbook

Our personal choices for the best offerings in the *Fieldbook*:

• **"Balancing Inquiry and Advocacy,"** by Rick Ross and Charlotte Roberts, offers several guiding principles for introducing the five disciplines—a good preparatory exercise if you are just getting started (p. 253).

• **"The Language of Systems Thinking: 'Links' and 'Loops' "** by Michael Goodman, Jennifer Kemeny, and Charlotte Roberts. An introduction to using causal loop diagrams to describe organizational problems (p. 113).

• **"Drawing Forth Personal Vision"** by Charlotte Roberts, Bryan Smith, and Rick Ross. An excellent solo exercise for creating your personal vision (p. 201).

• **"Archetype Family Tree"** by Michael Goodman and Art Kleiner. A graphical overview of all the archetypes. It provides pathways for using the archetypes to diagnose a problem or issue (p. 149).

• **"Building Shared Vision: How to Begin"** by Bryan Smith. An excellent, five-stage introduction to developing a shared vision. It offers strategies for how to move the organization forward, regardless of which stage you are currently in (p. 312).

• **"Seven Steps for Breaking Through Organizational Gridlock,"** by Daniel H. Kim, shows how to use the "Shifting the Burden" archetype in a step-by-step process to break organizational gridlock (p. 169).

• **"Systems Thinking in the Classroom"** by Frank Draper. A personal story of how one teacher introduced systems thinking into a middle school in the hopes of helping students become lifelong learners (p. 487).

• **"Beyond Training Wheels,"** by John Sterman, describes the limitations of systems archetypes and causal loop diagrams and explains why computer modeling is essential for gaining solid understanding of a system (p. 177).

• **"Using Microworlds to Promote Inquiry"** by Michael Goodman. A philosophic approach to designing managerial microworlds that promote continued learning and inquiry (p. 534).