

What is Action Learning? Components, Types, Processes, Issues, and Research Agendas

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Abstract

Action learning's central insight is that it is possible to develop organizational members' competencies in the process of solving real, difficult organizational issues. Despite considerable interest and practice in action learning, human resource development has had difficulty in identifying distinctive features of action learning for research and practice. To clarify the nature of action learning, this article relies on recent reviews of action learning research and the author's own experience in action learning practice. Additionally, this article will provide information on the fundamentals and importance of action learning. Included are core components of action learning (teams, problems, competencies, questioning/reflection/feedback, and learning coaches), two types of action learning (team-projects and individual-projects), and the action learning process (preparation, team meetings, and follow-up activities) from a practice perspective. Also included are critical related issues (the balancing act of action and learning, importance of context, and assessment of current research) and research agendas (continued research on the balance issue, key success factors of action learning, and comparison of three team learning approaches) for further investigation from a research perspective.

Keywords: action learning, the balance issue, action learning research and practice

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In the following action learning scenario, participants work through the action learning process to solve the organization's strategic issues and obtain help from colleagues and a learning coach through the exchange of ideas about their own problems:

A company in South Korea is very successful in the food industry and eager to join the global market. The company CEO wants to know if the timing is right and what country will be most feasible for global market expansion. The company's Human Resources department in the company forms an action learning team of six executives from cross-functional divisions with a learning coach and allows the team nine months to solve the corporate strategic issue. The team meets bi-weekly and proceeds with the next steps. During the first few weeks, the team clarifies the output of the project, gets lessons for problem-solving skills, and invites area experts to gain a better understanding of the global market. China surfaces as a promising market. The team visits Beijing and Shanghai where there are factories in the industry so they can collect data. The team analyzes the interviews and observational data and comes back to Korea to present what they found and recommend what the company should do to successfully enter the global market in China. The CEO and executives evaluate the team's solutions and decide either to pursue the recommendations or to stop right there (Cho & Bong, 2013, p. xxi).

In this typical action learning scenario, a learning coach, through questioning, plays the important role of helping the team to focus on problem-solving and reflecting on the action learning process for more effective learning and performance outcomes. In the process, participants learn effective problem-solving skills and tools as well as the content involved.

Action learning is a process and tool that enables individuals and groups to learn while solving problems and implementing actions (Marquardt & Banks, 2010). Action learning is among the most widely used interventions for leadership and organization development (Dilworth & Boshyk, 2010; O'Neil & Marsick, 2007; Pedler, 2011; Raelin, 2008). Park, Kang, Valencic, and Cho's (2012) recent content analysis of 127 action learning cases published in *Action Learning: Research and Practice* from 2004 to 2012 shows that more than half of action learning cases are used as a tool for leadership and organization development in diverse contexts (business, education, health, and public sectors). The popularity of action learning has increased because of tangible outcomes and solutions and its relevance to real organizational issues using teams in organizations (Raelin, 2008).

Despite considerable interest in and practice with action learning, due to its use in diverse organizations and industries in different countries, human resource development (HRD) has had difficulty in identifying distinctive features of action learning for research and practice. A better understanding of action learning and its intersections with research and practice has become possible based upon recent reviews of action learning research (Cho & Egan, 2009; Park et al., 2012).

To clarify the nature of action learning, this article relies on recent reviews of action learning research and the author's own experience in action learning practice and will provide information on the fundamentals and importance of action learning. Included are core components of action learning (teams, problems, competencies, questioning/reflection/feedback, and learning coaches), two types of action learning (team-projects and individual-projects), and the action learning process (preparation, team meetings, and follow-up activities) from a practice

perspective. Also included are critical related issues (the balancing act of action and learning, importance of context, and assessment of current research) and research agendas (continued research on the balance issue, key success factors of action learning, and comparison of three team learning approaches) for further investigation from a research perspective.

Core Components

The founding father of action learning Reginald Revans first used the term “action learning” in published form (1972), though he had already been implementing action learning since the 1940s in order to solve the turnover issue of nurses in hospitals as well as the low productivity in coal mines (Boshyk & Dilworth, 2010). Revans did not define action learning but described it in terms of what it is not (e.g., a case study or a task force), because he believed that to define it would constrain its meaning (Revans, 2011). As a result, many definitions and variants of action learning have been used, including business-driven action learning (Boshyk & Dilworth, 2010), critical action learning (Vince, 2004, 2008), and virtual action learning (Dickenson, Burgoyne, & Pedler, 2010). This lack of an agreed definition has led to a misunderstanding of action learning practice.

Many action learning frameworks focus on the combination of two consistent themes: real, work-based issues and team learning (Raelin, 2008; Revans, 1982, 2011; Vince, 2004). Action learning is based on the notion that people learn most effectively when working on problems occurring in their own work settings. Participants in action learning environments learn as they work by taking time to reflect with peers, giving team members an opportunity to offer insights into each other’s workplace problems. Participants learn best when they reflect together with like-minded colleagues.

On the grounds of research and practice in action learning (Cho & Bong, 2013), five core components of action learning (teams, problems, competencies, question/reflection/feedback, and learning coaches) have been identified and, if seamlessly intertwined, would promote participants’ learning and deliver quality solutions as intended:

- Action learning is based on *teams*. The key to action learning involves participants and teams. A team consists of five to six participants because the team size should ensure diverse perspectives and prevent free-riders. Participants’ jobs, educational backgrounds, experience, cultures and nationalities, and genders should be factored in to realize diversity in action learning.
- Action learning revolves around a *problem* to maximize the effectiveness of learning. An action learning project should be something to add value to the organization and should be difficult for participants to solve because adult learners learn best while solving real world problems. There are two types of projects in action learning: individual projects and team projects. In an individual project, participants provide insightful questions, advice, and information to assist other participants with a problem in the problem-solving process and to enhance their learning. In a team project, participants collectively work on one project to solve issues at work for the organization’s competitive advantage.
- Participants enhance their *competencies* both in content knowledge (know-how) and process skills (using various problem-solving tools) in the action learning process. Participants learn both explicit and tacit knowledge that are required to solve problems in order to identify customers’ needs through the benchmarks of best practices developed by competitors and industries as well as by internal experts. Participants, through teamwork, also learn how to use various tools and techniques for communication, decision-making,

problem-solving, and conflict management as well as for leadership skills. For these reasons, many organizations in the world use action learning for talent development and for preparing future leaders.

- Action learning encourages *questioning, reflection, and feedback* to generate transformational learning and effective solutions in the problem-solving process. Participants ask questions and reflect on what to know, how to improve teamwork, how to better solve problems, and how to maximize learning in the process. Participants also ensure the quality of learning and the process through peer and external feedback. With respect to the relationship between questioning and knowledge in action learning, Revans (2011) emphasized that learning (L) is maximized if programmed knowledge (P) is combined with questioning (Q). In his action learning formula, “ $L = P + Q$ ” (Revans, 2011, p. 3), questioning insight is more important than knowledge acquisition. The key to learning is in finding the right question to ask. Questions that help people to get started along this path include: What are we trying to do? What is stopping us from doing it? What can we do about it?
- *Learning coaches* (internal or external) are used to provide help for those who are not familiar with problem-solving processes, questioning, reflection, and feedback. Learning coaches are those who oversee the quality of team processes and learning through the use of effective communication, collective decision-making, problem-solving, and conflict management tools and techniques. Practitioners, however, should limit a learning coach’s role to be a process facilitator so (s)he does not intervene in the learning team’s problem-solving process.

Two Types of Action Learning

Action learning teams may be formed for the purpose of handling either a single project or several projects (Marquardt, 2004). Table 1 provides a comparison of two types of action learning: team-project action learning (“single-problem” or “in-company action learning” in Marquardt’s terms) and individual-project action learning (“multiple-problem,” “open-group” or “classic action learning”).

Table 1

Two Types of Action Learning

Team-Project Action Learning	Individual-Project Action Learning
<ul style="list-style-type: none"> • Entire team works on a single project • Project determined by organization • Participants determined by organization • Organization commits to take action • Team recommends and/or implements • Learning coach may be rotated or permanent 	<ul style="list-style-type: none"> • Team works on individual projects • Projects selected by participants • Participants self-select • Individuals commit to take action • Individuals implements solutions • Learning coach usually rotates

(Source: Adapted from Marquardt, 2004, p. 6)

In team-project action learning, participants work on solving a single project. In this type of action learning, both team members and a project are usually determined by the organization. The major purpose of this action learning program is to solve the issues at work proposed either by the organization or by the team itself. We find this type of action learning in many US and

South Korean organizations because they aim to enhance the level of competencies of organizational members and to realize management innovation or a learning organization through teams' problem-solving of issues at work.

In contrast, in individual-project action learning, participants bring in their individual projects to the team to solve problems at work with the help of team members. Participants support each other throughout the action learning process. In team meetings, participants allocate time for presenters to receive feedback from team members. Participants come from a single unit in the organization or from different organizations as in many UK and European organizations. This difference may reflect the distinct features of the context—whether the purpose of an action learning program is to enhance individual/group/organizational performance or whether action learning focuses on personal development in public and government sectors.

In rare cases, team-project and individual-project action learning are combined in an action learning program (titled “dual-project action learning”) to balance action and learning in the action learning process. A dual-project action learning program requires that participants carry out both team and individual projects. Yoon, Cho, and Bong's (2012) case study of *LG Philips* in South Korea demonstrated the impact of a dual-project action learning program on the company's team leader successors in terms of their business awareness and leadership competencies.

The Action Learning Process

The most common action learning process can be summarized according to the three stages of the action learning process: preparation, team meetings, and follow-up activities (Cho & Bong, 2013).

Preparation

As a first step, sponsors (executives and managers) in the organization are secured before launching an action learning project. Revans (1982) has emphasized the significance of a “structure of welcome” (p. 45) before setting up meetings because building trust and rapport between participants and organizations is the key to success in action learning. Initial efforts for building trust and openness and securing management support lead individuals and organizations to further engagement in an action learning project (Edmonstone, 2011; Olsson et al., 2010). An orientation session enacted in this preparation stage helps participants better understand how action learning progresses by providing information about the action learning process and ground rules for teamwork.

Team Meetings

Action learning projects are work-based and difficult to solve alone (Revans, 2011). In the team meetings stage, action learning practitioners deal with the project and team selection, roles of a learning coach, problem-solving processes, reflection, and organizational support.

In the team selection, team members with diverse backgrounds are highly desired because participants of diversity can generate innovative ideas and explore different solutions. Revans's (1982) concept of “comrades in adversity” (p. 720) implies that participants form a collective spirit through hardships in solving difficult issues at work in the action learning process. However, some scholars (especially critical action learning scholars) (Ram & Trehan, 2009) indicate that this comradeship may hinder participants' active involvement in the action

learning process because of the team leader's possible authority and organizational power and politics.

Learning coaches help participants learn the content of the project and problem-solving process using questions, feedback, and reflection in the action learning process. The roles of a learning coach, however, are debatable. Following Revans's (2011) classical principle, some scholars (Bourner, 2011) claim that a learning coach should have a limited role, making their presence known until participants can self-manage their learning. Other scholars (Ram & Trehan, 2009) claim more active roles of a learning coach, so participants can ask questions, go through the action learning process, and perform critical reflection. Discussions on learning coaches, therefore, revolve around the degree to which they help participants learn and act in the action learning process.

In the team meetings stage, reflection is crucial to balance action and learning in the action learning process (Cho & Egan, 2009, 2010). Reflection creates learning grounded in past and current experiences, and makes action and learning stronger in action learning teams (Reynolds, 2011). Through reflection, action learning teams can convert tacit knowledge into explicit knowledge and improve their thinking and solutions to challenges that the teams face. In many cases, action learning participants use public reflection through the feedback of their team and a learning coach, followed by individual journaling of the action learning process (Raelin, 2008).

Sponsors play a critical role in action learning including the selection of action learning projects and participants, clarification of the outputs, communication with stakeholders (e.g., CEOs), motivation of participants, provision of physical and personnel resources, and decisions regarding implementation and follow-up activities. Executives, managers, and team leaders as sponsors support participants throughout the action learning process, which leads to the organization's performance improvement. Cho and Egan (*in press*), for instance, suggests that employees who perceive their organizations to be supportive of action learning would have positive reactions about their work and organization, and these reactions are likely to lead to greater motivation to transfer learning and improved performance.

Follow-up Activities

In the follow-up activities stage, organizations (sponsors) make a decision on the implementation of action learning teams' solutions at the final team presentations. Participants share their solutions and lessons learned from their action learning process with other organizational members through annual action learning conferences and knowledge management systems (e.g., intranets) in the organization. These communication channels are outstanding venues in which organizational members can share key success factors of action learning practice.

Depending on the context, learning environments may take several forms in action learning practice. Face-to-face action learning teams are most common in the cases identified (Park et al., 2012) but blended learning environments incorporating online and face-to-face meetings are growing in order to overcome time and place limitations of action learning participants (Stewart & Alexander, 2006; Thornton & Yoong, 2011). Increased use of technology in action learning (Dickenson et al., 2010; Hauser, 2010) opens many possibilities concerning how blended learning contributes to undertaking new learning platforms, motivating participants, and encouraging reflection in different contexts as well as meeting the immediate needs of busy managers and executives.

Critical Issues

Critical issues involved in action learning research include the balance between action and learning during the action learning process, the importance of context in the application of action learning, and the assessment of current action learning research.

The Balance Issue

While “action” (outcomes and solutions) in action learning is defined as a learning output as well as an input to the process, “learning” is acquired at the level of individuals, teams, and the organization (Cho & Egan, 2009). Solving a problem is critical only if there is learning from the experience. As Revans (2011) put it simply, “There is no action without learning and there is no learning without action” (p. 74). The real value of action learning that differentiates it from other action strategies (e.g., action research) is a pragmatic focus on learning for the sake of problem solving (Raelin, 2008). An unbalanced approach to action learning, therefore, is not productive, as action without learning is unlikely to return fruitful longer term results, and learning without action does not facilitate change (Cho & Egan, 2009, 2010).

Ideally, “action” in action learning is not the goal, but should be the means by which learning is achieved (Rooke, Altounyan, Young, & Young, 2007). In reality, action learning programs have a tendency either to foster action at the expense of learning (called “action-oriented action learning”) or to be oriented to learning (“learning-oriented action learning”) instead of balancing learning with action (“balanced action learning”). As of late, a greater emphasis has been put on learning-oriented action learning (Cho & Egan, 2009). This latter finding is consistent with previous studies indicating that action learning practices are more often perceived to be successful when aimed toward personal growth and learning, but not necessarily conducted toward organizational learning and development (Pedler, Burgoyne, & Brook, 2005; De Loo, 2002; Vince, 2004). Without knowledge about organization-level development and change, action learning practitioners may not consider ways that action learning efforts can be applied to their specific job and organizational contexts.

To balance action and learning in the action learning process, reflection is employed. Reflection is “the process of stepping back from experience” (Coghlan & Brannick, 2005, p. 35) to process what the experience means, with a view to planning further action. Unbalanced (action-oriented or learning-oriented) action learning can be overcome by reflective practices (e.g., public reflection) because reflection is essential to learning in order to convert tacit experience into explicit knowledge (Raelin, 2008).

Importance of Context

Despite the lack of an agreed upon definition of action learning, there are certain basic concepts to be recognized no matter what form of action learning practitioners want to deliver. Problems, teams, questioning, learning coaches, learning and action are essential elements that any action learning program must have. However, there must be cultural and contextual constraints so that action learning needs to be continually revised and modified. For instance, the use of a learning coach that Revans (2011) strongly rejected in action learning may be necessary in other cultures where a learning coach is welcomed in the action learning process. The active use of a learning coach fundamentally violates one of Revans’s basic principles concerning the role of a learning coach. Revans made it clear that only in the early stage is a learning coach needed to launch action learning but (s)he must eventually get out of the action learning team to

avoid getting in the way. However, learning coaches—those who are selected from the talent pool—can enhance their facilitative leadership by tackling organizational issues as well as guiding participants. As a result, we face a tough challenge that has to strike a balance between continuing Revans's classical principles and customizing action learning in order to meet the requirements of cultural contexts.

Assessment of Current Research

Cho and Egan (2009) reviewed 50 empirical studies on action learning published in the *Action Learning: Research and Practice* journal from 2000 to 2007. The quality of those empirical studies was examined for key methodological traits (Brown, 1989; Buhi & Goodson, 2007; Dillman, 2007), including the use of conceptual framework, identification of study participants, study design, analytic methods, and the precise description of these traits in the reporting of the study. Only 17 studies (34%) involved common features for quality research and thus the overall improvement of current research is necessary for theoretical development of action learning. Thirty-seven case study approaches (74%) were the most frequently used method and these study limitations call for longitudinal designs and quantitative approaches to data collection and analysis in action learning research.

Future Research Agendas

The balance issue in action learning research and practice will remain a major critical research issue to be dealt with in the field. Future research agendas will involve key success factors of the use of action learning in diverse contexts. Another research agenda involves the comparison and contrast of the three popular learning approaches (action learning, problem-based learning, and project-based learning) that have been used in diverse contexts.

The action-learning balance issue stands out not only as a major consideration for action learning but also as an important lens through which to examine the action learning literature (Cho & Egan, 2009). An examination of balanced action learning approaches can be achieved through evaluation of action learning processes, participant experiences, and the manner in which action learning is framed in the literature. Individuals and organizations are aided by action learning that leads to more effective communication, work climate, cooperation, shared vision, and development at the organization level. Future research into the processes and outcomes of action learning that strikes the right balance is likely to serve as a catalyst for its diffusion and adoption.

Another promising research agenda includes the identification of key success factors of action learning in diverse contexts. When researching key success factors of action learning, a contextualized approach is important (Cho & Bong, 2013). From Revans's classical principles perspective (Pedler et al., 2005), it is common sense that for action learning to succeed we should compose learning teams with participants from diverse backgrounds and ensure that projects supported by sponsors are strategic and difficult. However, organizations choose projects that they can solve given their company's contextualized limitations (Cho, Bong, & Jang, 2012). The comparison of action learning in different organizations and corresponding key success factors of action learning in particular contexts, therefore, calls for further investigation.

HRD practitioners can learn lessons from other countries' action learning practice in terms of how cultural differences influence the action learning process. For example, Cho et al. (2012) showed that action learning practice in South Korea is unique in using a learning coach to bridge the gap between action and learning in the action learning process. Because Confucianism

is deeply rooted in South Korean culture, action learning participants are not accustomed to questioning, so there is high demand for the use of a learning coach, someone who can provide guidance through the action learning process. Selecting competent learning coaches has been a key success factor for action learning. HRD practitioners, therefore, should exercise a balancing act of keeping Revans's classical principles that need to be applied in any situation and customizing action learning to meet the requirements of cultural contexts.

Action learning has been actively used in business, though it is not prevalent in education, particularly in the U.S., where problem-based learning and project-based learning are much more prevalent. These three team learning approaches have commonalities in terms of emphasizing the interconnection of learning and work, and valuing the power of teamwork, the problem-solving process and reflection, and the use of a facilitator (or a learning coach) (Cho & Brown, 2013; Part, Cho, Yoon, & Han, 2013). Differences lie in a particular context where each learning approach is used, the extent of using structure in the learning process, and the role of a learning coach. Action learning, due to its frequent use in business, encompasses participants' self-managing learning process to generating solutions with minimal guidance of a learning coach. The less structured learning process and limited role of a learning coach in action learning are different from the other two approaches. Comparison of the distinct features of the three team learning approaches will therefore provide team managers, instructional designers, and HRD practitioners with guidance for pedagogy selection regarding what particular team learning approach best fits an organization's learning goals.

Conclusion

To some HR scholars, action learning has been "so heavily practice-oriented that it is almost impossible to conduct research" (personal communication with an HR scholar in a US business school, January 15, 2007). They might be right about action learning being heavily practice-oriented but wrong about the impossibility of doing research in the field. Among many, the *Action Learning: Research and Practice* journal has been an outstanding venue for the field's research and practice. The journal has generated different types of research and accounts of practice through qualitative and quantitative evidence and impact of action learning in diverse contexts in the past decade. Our efforts to make action learning evidence-based and develop theories in action learning and its intersection with HRD will be continued with research agendas for investigation suggested in this article.

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