

The OODA Loop and Learning

BY DUANE SPIVEY

A common criticism of learning leaders is that they don't "get" strategy. The first step is having a strategic focus on thought processes, evaluation and execution.

Be a businessperson first and a learning professional second, and measure the impact of learning on the business: These two tenets have been rallying cries in developing a learning strategy in the past few years. Much advice has been dispensed on these subjects, and numerous articles have explained or described how to make learning part of the business ecosystem. But what tools can learning executives employ that allow them to make decisions in a fast-paced marketplace that doesn't allow for exploring all the options with all the information?

Several CLOs have told their CEOs that they believe learning is organizationally strategic and should be thought of in that light. However, the look on many of those CEOs' faces gave them a clear response: Just saying it doesn't make it a reality. In fact, many of them don't see how learning could really change the enterprise — because they don't see how the learning function is strategically connected to the vision and mission of the organization.

To move beyond being a training department and becoming an organization that aligns employee learning with organizations' business goals, learning executives need to be connected to every part of the organization. To do that, they need to be business professionals, as well as learning professionals.

While there has been a cornucopia of information available on measuring learning, not as much attention has been given to how learning professionals can be businesspeople first. Is there a tool or model learning leaders can use to connect learning initiatives to business goals and show up as serious players on the executive team? Yes, and it's called the OODA (pronounced "oo-da") loop.

The Loop

While it may have a funny name, the OODA loop has been employed as an effective tool by the likes of the United States Marine Corps to develop its maneuver warfare doctrine, which in turn dictates battle strategies. It also has been used by General Re Insurance,

Intel, Nokia and several other corporations to produce a competitive advantage in the marketplace.

Created by Col. John Boyd, the OODA loop — which stands for observe, orient, decide and act — was originally designed as a way to understand conflict and provide military leaders with a model or method for making decisions and assessing their impact. This is done in an ever-changing and chaotic world in which actors seldom have all the relevant information.

Some say the OODA loop helps develop strategy, while others say it also can be used as a tactical tool. Either way, line-of-business executives have used it for marketing, sales and operational improvements for more than a decade. As more organizations come to realize the importance of learning to their success, learning executives can use the OODA loop as a means of helping line-of-business leaders understand how to create and implement learning programs that will help them compete.

Figuring out what learning needs to be developed and then executing on that are the two fundamental things a learning organization has to deal with. While the second part is not simple, there is a wealth of information about it. What we're talking about is how we choose which learning intervention to employ to align with a company's objectives, what tools we have at our disposal to do this most effectively and how we measure or report successes.

AT A GLANCE

The OODA loop has four steps:

1. Observe.
2. Orient.
3. Decide.
4. Act.



Often, learning executives only have pieces of the story, and even more often, they have to help create it themselves. Usually it looks like a snapshot in time, such as, “We need to improve sales in the next two quarters,” or, “There is a new infectious disease procedure that everyone needs to know about right now.” What do you do when you get the question: “How can learning help our organization be more competitive?”

Observe

“To acquire knowledge, one must study; but to acquire wisdom, one must observe.”

– Marilyn vos Savant, American columnist

Some things are obvious, while others are not. But just saying observation is critical to “seeing” what’s happening in business is like saying we need air to live. On some level, everyone knows it. At the same time, executives are seldom taught how to observe; instead,

they’re only told to do it. One of Boyd’s acolytes, Dr. Chet Richards, said, “physically we interact by opening up and maintaining many channels of communication ... mentally we interact by selecting information from a variety of sources or channels.” How we observe is just as important as what we observe.

In the OODA loop, observation is defined and examined in three categories: unfolding circumstances, outside information and unfolding interaction with the environment. Inside each of the three categories, politics, demographics, economics and technology are four areas that deserve attention. Politics change the rules of business, demographics change who participates and where they participate, economics determine the level of participation, and technology reduces the cost and increases the speed of participating.

Since we constantly interact and interpret, our environment is in constant flux. Listening to what others say outside the organization, observing changing mar-

ket conditions and our interaction with or response to those changes all make up a learning executive's perception of what interventions should take place.

Orient

"Vision is the art of seeing the invisible."

— Jonathan Swift, author and satirist

We are made up of our experiences — both individually and corporately — so observation is different for each of us. Our orientation to what we observe becomes the basis for decision and action as we feed forward in the loop. Factors such as cultural traditions and genetic heritage determine how we observe our environment. Analyses and syntheses, previous experiences and new information all affect our orientation to the world around us and how we interact with it.

These are the categories used in the loop to explain orientation as a means of making a decision. When incorporated together, they allow us to create a story about what's happening in our environment and to respond.

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Culture and genetic heritage play a large role in what we observe and our conclusions about our environment. If you work at Wal-Mart, it's all about low cost, whereas if you work at Nordstrom, it's all about customer service. If you have younger workers, they want learning delivered via the Web or with mobile content. All of this gets filtered and sorted as we orient to what we care about.

Analyses and synthesis are the formal and informal processes each organization chooses to implement as part of the decision making process. Boyd describes this process as "reaching across many perspectives; pulling each and every one apart, all the while intuitively looking for those parts of the dissembled perspectives which naturally interconnect with one another."

Since business is an ever-changing situation, previous experiences and new information allow for adjustments in orientation. The danger here is not to let culture and heritage impede the flow of new or contradictory information. An example of this is the historical learning model in the health care industry. Traditionally, clinical educators designed the courses and determined what was taught and what was discarded. There was no thinking around how the training was delivered or if the content should be changed.

The loop enables learning executives to provide better guidance and control to their organizations about what type of learning needs to take place, how should it be delivered, who should be involved in the development and what outcomes are expected.

Decide

"No one learns to make right decisions without being free to make wrong ones."

— The Rev. Kenneth Sollitt

Decisions come from orientation, not observation. But the results show up in the observation phase of the loop. Many people skip or don't take into account how orientation affects their decisions. It is the lens through which we "see" everything. Our perspective on each of the categories in the observation stage is filtered through our cultural traditions and genetic heritage. It always will be different and ever-changing, with variations depending on our environment.

Once you observe your environment in terms of politics, demographics, economics and technology, you can orient to what you care about inside those areas and develop a hypothesis for action. Only then can you choose a course of action. While this might seem simplistic, if you've ever tried to get a group of people to make a decision, you understand just how hard it can be.

The decision part of the loop is where leadership shows up, not by having all the answers but by leading the organization in determining a course of action. Differing assessments, diverging points of view and open discussions all characterize the decision phase. Having specific goals, measurements and a process for gathering assessments to feed the observation phase all should be part of the decision process, especially when working to reorient people to new ways of thinking or acting.

Last but not least, speed is the key. The whole purpose behind using the loop is not to get bogged down in a staged process. It is to increase the velocity at which decisions can be made in an effort to produce action consistently and effectively.

IN PRACTICE PALOMAR POMERADO HEALTH: GENIUS IN SIMPLICITY

Point-of-care tests are those quick tests that nurses administer at the bedside. These typically include glucose, urine analysis, pregnancy and others. The learning function at Southern California-based health system Palomar Pomerado Health was asked by the laboratory to design training for nurses to do these tests.

The specific challenge was that nurses were not doing the tests the same way at each of Palomar Pomerado Health's hospitals. Inconsistencies that lead to inaccuracies in a field such as health care are always potentially dangerous. Historically, having nurse educators conduct training had always been the solution. The problem was that they had varying opinions about the "correct" way to do the procedure.

Obviously, there were continued discrepancies in the quality of the procedures. Palomar Pomerado Health decided to take a chance with a virtual idea. The learning department's in-house developer started developing a SCORM-compliant course that had three parts: an educational video, an interactive but virtual hands-on training segment and an assessment.

The video demonstrates the procedure, but the most powerful part of the module is the virtual training segment. Using Learnsoft's LMS, each nurse is able to quickly access the course, and it takes only seven minutes to complete the drag-and-drop virtual procedure in the Flash-based training segment. This is followed by a short quiz.

Palomar Pomerado Health conducted clinical trials of four groups of new nurses at each of its hospitals and observed that all nurses (about 45) completed the course in 14 minutes. None of the nurses had ever physically done the procedure before. No supplies were used during training. A live educator was never required. The nurses took the course on the fly during the workday where they could fit it in. When the results came in, all performed the live procedure flawlessly the first time, without exception.

There were so many wins resulting from this training course that it is now a prototype for how Palomar Pomerado Health designs procedural content. The learning function has since produced eight of these of point-of-care test courses and has shared them with a local school of nursing.

Generally speaking, nurses often believe that they alone hold the knowledge to train people effectively. By observing this program and orienting to a new way of thinking, Palomar Pomerado Health was able to reorient the behavior and culture of the nurses within the company. This point-of-care program was a giant leap in convincing stakeholders that a professional learning approach just might be superior to SME knowledge alone. It boosted the perception of the education department in the organization and helped convince doubting SMEs throughout the company.

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Act

"Vision without action is a daydream. Action without vision is a nightmare."

— Japanese proverb

Action is more than just doing something. It's taking account of what you are doing with the result in mind. It's observing the result and making an assessment about whether you accomplished the intended result and, if not, what breakdowns occurred and how to overcome them.

Learning should not be an episodic event, and neither is the loop. It should never end. This is the point. The OODA loop by design continues through explicit or implicit guidance from one stage to the next. Building learning organizations means we must be strategic in our thinking or face the consequence of being relegated to just training.

Putting It All Together

"As our case is new, we must think and act anew."

— Abraham Lincoln

While the OODA loop originally was conceived for one person, it becomes even more effective when used

by many. Information is readily and widely available, which has led us beyond the age of the top-down, command-and-control leadership model to a more decentralized decision-making structure. The result of this is increased velocity with relation to changes in the marketplace. As John Perry Barlow of Merrill Lynch said, "This will not be an easy time for control freaks. It will be a great time for the agile, the small, the cunning and the brave."

With so much information at your fingertips and the rapid speed of business, having a method for teaching everyone in the organization decision-making skills becomes essential. New skills will be needed, new ideas will emerge and new thinking will evolve. This is the time when organizations need their learning executives to step up and lead the way. Using the OODA loop provides learning executives with another tool to understand their organizations and make decisions about where they can provide experiences that give the workforce a competitive advantage. **CLO**

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