Learning Around the Lunchtable: A Sensemaking Mechanism for Busy Employees in Chaotic Times

Ludlowe Technology Company

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This case describes the creation and successful implementation of a series of bimonthly meetings for managers, called the Manager Lunch-and-Learn series. This program was developed by managers for managers as a way to provide a group of busy people with an opportunity for sharing best practices and for ongoing learning and dialogue about relevant topics. The context for this series was a small technology company in Research-Triangle Park, near Raleigh, North Carolina. The company had experienced dramatic growth during the height of the dot-com phenomenon, followed by precipitous decline—decline evidenced by a 90-percent drop in the stock price as well as by multiple rounds of layoffs as the company "resized" to a new business model of a software and services company.

Organizational Profile and Background

The organization we will call the Ludlowe Technology Company was a 450-person business-to-business e-commerce company at the time the mentoring program began. Ludlowe had gone through extensive change, and by the fall of 2001, it was a 130-person software and services company.

Key Issues and Events

I was brought in as director of organizational effectiveness in November of 1999, during the period of fast growth. The primary thrust of my position was to determine learning and organizational development

This case was prepared to serve as a basis for discussion rather than to illustrate either effective or ineffective administration and management practices. Names of places, organizations, or people have been disguised at the request of the author or organization.

needs, and then to build and facilitate suitable interventions to meet these needs. There were several triggers for the development of an ongoing learning mechanism for managers. The first trigger centered on the fact that, as the company grew quickly, most of the managers were brought in from other companies, where they had worked for a number of years. Examples of these companies included Federal Express, Wal-Mart, IBM, General Electric, Carolina Power and Light (now Progress Energy), and Baxter Scientific. It was at these companies that they had received both their formal management training as well as their informal training—informal training that was largely responsible for their respective mental models about what "good" management looks like.

Based upon their divergent philosophical perspectives on management, each of the managers approached their duties very differently. Indeed, as a result of these different ideas on how to manage people, the company experienced a bit of an internal "culture clash." The managers' varying management styles created a fair amount of confusion from work team to work team as employees experienced very different realities based on their manager's personal approach to building and maintaining the team.

A second trigger was that the managers found themselves on a new terrain as a business-to-business e-commerce company, which was a brand new business model. In addition to this, the pace at which things occurred was extraordinarily quick—a pace often referred to in the press as "Internet time." The managers craved knowledge and information about how to work with new people in this new work environment so that they could make sense of what was happening to them and be effective in their roles.

Target Population

The target population for this learning intervention included the Ludlowe technology managers. For the purposes of this program, I defined managers as those people who managed other people. As the program went on, I added to this list key individual contributors who indirectly managed and influenced other people through their roles in leading committees and other key task forces that were deemed strategically vital to the organization.

The managers were chosen as a target population not only because of the key organizational issues outlined in the previous section, but also because they were (and are) a critical group of stakeholders who served two important roles for the organization. The first role was that of leader of their respective teams or key projects. The second role was that of translator and enabler of strategic organizational goals. Quite simply, it was to this group of people that the "rank and file" employees looked for cues about what was important and on what they should focus their time and energy. Thus, it was clear that this group of people was critical to my ability to successfully guide organizational learning and change.

HRD Program Description and Delivery

Based on my desire to engage and secure real buy-in from this group of stakeholders, as well my conviction that learning needs and format should ideally come from the learners themselves, I invited everybody who managed people to a "managers roundtable discussion" over lunch. Figure 1 shows the email invitation to this meeting. I hoped to engage this group in a discussion about their issues and needs relative to their duties as managers, as well as to create a learning design that would work for this group from the perspectives of both content and timing. The value of the program to each of the participants was particularly important for gaining and sustaining his or her buy-in.

I did not share with this group the fact that I was using this meeting as a way to test an evolving hypothesis about what a successful, sustainable learning program for managers could or should look like. This hypothesis was based on what I had viewed to be some of the weaknesses of the alternative management development models I had witnessed, participated in, studied, or facilitated.

Figure 1. Email invitation to initial needs gathering/kick-off lunch.

To: Email distribution list of managers (via Outlook Calendar*)
From: Christie Knittel Mabry
Re: An invitation to lunch to discuss your needs/issues as managers

Please join us for a discussion over a pizza lunch about your needs and issues as managers of people in this organization. This will be an opportunity to network with other managers, to give feedback, and to share ideas/best practices. It will occur in the conference room from 11:00 a.m. to 1:00 p.m. Please don't hesitate to be in touch with any questions, and I hope to see you there!!

*Because this was sent via the Outlook Calendar option (which was a widely used practice at the Ludlowe Technology Company), managers could either accept or reject my meeting request. If they accepted, it was automatically scheduled on their calendar. This eliminated my need to remind them of this meeting when the day arrived.

As have many HRD practitioners, I had built and delivered numerous classroom-based learning "events" for managers over the course of my career. These were typically three to five days long, and included managers from offices across the country who were pulled off their jobs and asked to travel to the home office. The costs of these "productions" invariably included outside training vendors (whose price tag usually exceeded $20,000 for the three to five days), travel, food, materials, and lost productivity on the part of the managers and any subject matter experts who ended up speaking to the class. All of these costs (including my time) added up, typically exceeding $50,000 per event. Because of the time and costs associated with putting together one of these training sessions, they often ended up as one-time events, after which it was difficult to follow up with any real success. Because of this, and because of the isolated nature of these events, very little real learning or change occurred.

Although the intentions behind building and facilitating these events were always good and the level-one satisfaction evaluations were generally positive, this model seemed inherently flawed for several reasons. Included in these reasons was the reality that this training was inordinately expensive, the agenda (which was often set by a corporate "higher-up") was often irrelevant to the real day-to-day needs of the learners, and the stand-alone nature of these "events" made it hard to truly incorporate what was learned into the fabric of the everyday realities of a complex and ever-changing organization.

I had long suspected that a successful learning intervention should

- be regular and ongoing
- avoid pulling managers off their jobs for long periods of time
- be convenient and use attendees' time well
- be based upon the managers' changing needs (because they would set the agenda for each meeting)
- showcase the attendees as the experts (and not necessarily involve an expensive vendor)
- generate an action plan for any ideas that emerged from the group, on which the next meeting could follow up.

It was with this implicit agenda in mind that I designed and facilitated the first session (see figure 2 for a sample of the actual meeting agenda). The turnout of 30 of 38 managers was extraordinary and the discussion was lively. This group included all levels of management (with the exception of the CEO, who was traveling on business). As I had hoped, because of the energy generated by this first meeting, the managers articulated a desire to gather as a group on a fairly regular basis, both to learn from each other's experiences and best practices and to think about and discuss relevant emerging topical issues.

As part of the action plan that emerged from the first meeting, I typed up a synopsis of what the managers had said and then met several times with a small working group of volunteers who had attended the first meeting. This group analyzed the information that had been generated in the first meeting about the kinds of topics that were of interest to the group and the ways in which they hoped to address these topics (the process), and created a proposed action plan that included a bimonthly lunch-and-learn meeting in which the topics would change based on the needs of the group. This subgroup then presented the proposed action plan for an ongoing learning series to the larger group at a follow-up lunch a month later for feedback and buy-in. The larger group approved the proposal, agreed that they would meet on the third Wednesday of every other month for the rest of the year, and agreed on the topic for their next meeting.

In addition to the creation of the ongoing manager learning series concept, several other ideas that had come out of the first session were implemented. These included the following:

- a three-day basic management development course for first-time managers
- an ongoing lunch-and-learn series for all employees that would highlight various areas of the quickly growing company

Figure 2. Sample agenda for kick-off meeting.

Agenda

11:00–11:15	Arrive and get lunch—All
11:15–11:20	Opening comments, why we're here today —Christie Mabry
11:20–11:40	Introductions (name, department, role, etc.)—All
11:40–12:10	Key issues brainstorm/things that keep you up at night—All
12:10–12:40	Discussion and prioritization of issues generated—All
12:40–1:00	What next? Action planning—All

- a distance learning course on e-commerce (which was created in conjunction with a local land-grant university and was open to all employees)
- a Web-based mechanism for capturing and gaining approval for computer training needs
- a formal rewards and recognition program
- a formal organizational mentoring program.

Because the ideas for these additional programs were generated by the group itself, its members fully supported them when they were eventually rolled out to the entire organization. Indeed, I had never experienced such ease and acceptance in implementing organizational learning and development solutions in my career. I attribute this directly to the shared creation of these solutions by this group of managers.

My role was that of the lead facilitator for this learning series, and I collaborated closely with a colleague, who was then a training specialist. The managers generated content ideas for the next lunch-and-learn at the end of each session, as well as via an email needs assessment that I sent out approximately three weeks prior to each lunch. This continual needs assessment assured that the content of each session was relevant to the emerging needs of the group. Based on the topics that were chosen, at least four of the managers volunteered to facilitate discussions of books they had read that dealt with relevant material. Based on the meeting's content, my colleague and I would look for relevant material (such as books, research, or case studies) to support the learning discussion for each session. Figure 3 depicts the agenda used for the June session on management tools. It was very typical of the agendas for the ensuing sessions.

As described earlier, our initial session occurred in April of 2000. The subgroup met a week later, and then presented their proposal for an ongoing series to the larger group in May. Our next "official" meeting (the first in the official series) took place in June. Per the group's wishes, we met every other month thereafter. Each meeting ran from 11:00 a.m. until 1:00 p.m. We met in one of our conference rooms and had a catered lunch. The attendance and participation started high and remained that way throughout the series. Attendance was optional, and about 32 of the 38 or so managers at Ludlowe attended each session. After the first few meetings, the senior managers (direct reports to the CEO) stopped coming. Several of them indicated to me that although they enjoyed the sessions, they felt that their presence sometimes impeded the ability of their direct reports

Figure 3. Agenda for June Manager Lunch and Learn.

June Manager Lunch and Learn: Management Toolkit
Wednesday, June 10
Agenda

11:00–11:15	Arrive, get lunch, round-robin introductions—All
11:15–11:20	Review of agenda, goals for today—Christie Mabry
11:20–11:40	Getting familiar with some of the tools—All

Pair up with someone with whom you have not worked closely or that you don't know very well. Review the two books each of you was given: Carr and Albright's *The Manager's Troubleshooter: Pinpointing the Causes and Cures of 125 Tough Day-to-Day Problems,* and Lombardo and Eichinger's *For Your Improvement: A Development and Coaching Guide for Learners, Supervisors, Managers, Mentors, and Feedback Givers.* With your partner, flip through the books and get a sense for what each contains. Then, note and discuss at least three ways that these books may be helpful to you on your day-to-day job. Please be prepared to share what you've learned with the rest of the group.

11:40–12:10	Large group of discussion of first exercise—All
12:10–12:35	Review and discussion of Buckingham & Coffman's book *First, Break All the Rules: What the World's Greatest Managers Do Differently*—Scott Horton*/All
12:35–12:45	Rx discussion of current issues in which any member of this group would like to get feedback from the group —All
12:45–1:00	Plus/delta evaluation of this session, discussion of topics for next time, announcements—Christie Mabry/All

*Scott, whose name has been changed for this case study, was a manager in the group who volunteered to read this book and lead a discussion about it. He handed out a two-page synopsis of its key points.

to be as open and candid as possible. The format included spending the first hour or so eating lunch and discussing the topic at hand in pairs or small-group breakout sessions. The last hour was spent in large-group discussion of the results of the small-group breakouts, and the implications for the attendees as well as for the organization. In addition, we often included a prescription section (known as Rx) in which managers could bring current issues to the table to solicit feedback and learn from each other. The last 10 minutes were spent evaluating the program (we used plus/deltas), discussing the content of the next program, and opening the floor to any announcements.

As the lead facilitator, my primary goal was to create an ongoing learning community in which the managers could learn from one another so as to make better sense of their experiences in this organization. It was and is my belief that most of the wisdom resides in the life experiences of the group, and that what I could offer as an organizational effectiveness professional was a safe time and space for this to unfold. The following are summaries of the sessions.

June 2000

The subject was best practices in managing people. I purchased and distributed two books for each of the managers to review and discuss in small group breakouts during this session (and keep for future reference): *The Manager's Troubleshooter: Pinpointing the Causes and Cures of 125 Tough Day-to-Day Problems,* by Clay Carr and Mary Albright (1996), and *For Your Improvement: A Development and Coaching Guide for Learners, Supervisors, Managers, Mentors, and Feedback Givers,* by Michael M. Lombardo and Robert W. Eichinger (1996). The group reviewed the books in small groups and discussed their potential utility in their work in a larger group session. Then, one of the managers presented a review of a book he had recently read: *First, Break All the Rules: What the World's Greatest Managers Do Differently,* by Marcus Buckingham and Curt Coffman (1999). The ideas shared as part of this book review generated a very lively and interesting discussion among the group.

August 2000

Based on feedback from the June meeting, the group decided to focus on time management and life-balance strategies. The first activity involved small group discussions in which the managers brainstormed both their challenges with time management and life balance as well as their best practices. We then discussed these in the larger group. Then, following the successful precedent set the previous month, one of the managers presented a book review and facilitated a discussion on Cheryl Richardson's 1999 book *Take Time for Your Life: A Personal Coach's Seven-Step Program for Creating the Life You Want.*

October 2000

The managers requested that the October session focus on how to lead through change. To that end, my colleague and I did a quick review of the literature on change management and typed up one- to two-page summaries that captured the essence of Oleson's *Mastering the Winds of Change: Peak Performers Reveal How to Stay on Top in Times of Turmoil* (1993); Kotter's *Leading Change* (1996); Connor's *Managing at the Speed of Change: How Resilient Managers Succeed and Prosper Where Others Fail* (1992); and Bridges' *Managing Transitions: Making the Most of Change* (1991). We briefly described the essence of each book, and had managers opt into breakout sessions to discuss the book that interested them the most. In these groups, they discussed their "aha's" about these books as well as how the information in them could contribute to their practice of management on a daily basis. Each small group then presented the essence of their book and the key points from their discussion with the larger group for what turned out to be yet another terrific meeting.

December 2000

Our first round of layoffs occurred in November, so the managers wanted to focus on how to remotivate their employees. As in the previous month, we reviewed some of the relevant literature on the topic, which included Noer's *Healing the Wounds: Overcoming the Trauma of Layoffs and Revitalizing Downsized Organizations* (1993); Herman's *Keeping Good People: Strategies for Solving the #1 Problem Facing Business Today* (1999); Caplan and Teese's *Survivors: How to Keep Your Best People on Board after Downsizing* (1997); and Kaye and Jordan-Evans's *Love 'em or Lose 'em: Getting Good People to Stay* (1999). We once again followed a process similar to that of the previous month, which seemed to work for the group.

February 2001

With the advent of the new year and a new CEO (our previous CEO had stepped down in early February), the group had a number of "hot" topics they wanted to discuss. So we did a quick brainstorming session on topics when attendees arrived, ranked topics in terms of interest, and then picked the top four topics for the session. The topics were

- how to motivate employees during tough times (and when you as a manager may not necessarily agree with corporate policies)
- how to find a balance between treating people fairly (and not overworking them) and getting the job done
- how to conduct meaningful performance discussions
- how to allow employees to blow off steam in a safe way.

The small groups worked through these ideas, and then we discussed them in a larger group.

Our new CEO joined the meeting during the last 20 minutes of the discussion to introduce himself to the group and to hear what was on the attendees' minds. This served as a mechanism for the group to organize their thoughts and to get "facetime" with the new senior executive.

April 2001

After a small layoff in February and a layoff of 100 people in March, the group was feeling pretty down both about the layoffs and about the state of our business (we were in the process of changing business models from an e-commerce company to a software company, and it was a bumpy transition).

The group members weren't sure what they wanted to discuss, but universally knew that they wanted to continue getting together to provide support and encouragement for one another. This was, perhaps, the toughest session to design. One of the managers indicated in a conversation with me that he had just read Geoffrey Moore's book *Crossing the Chasm: Marketing and Selling High-Tech Products to Mainstream Customers* (1999), and that it had been very helpful in providing him with a mental model for what the organization was going through. I asked him to lead a review of the concepts covered in this book. I purchased copies of the book for each of the managers and, once again, the conversation was provocative.

Evaluations and Results

The evaluations were iterative in that we did them at the end of each meeting in the form of plus/deltas (what worked and what could be changed next time). Given that attendance was optional, the high turnout for each meeting was testament to the fact that this series was meeting the needs of the learners. I received positive feedback from managers after each of the sessions. Examples of the comments include: "This is the best meeting that I attend in this company—bar none!" and "You can tell by the attendance that these meetings are de rigueur for managers . . . they are the best thing happening in this organization!" and "Everybody in this room goes to too many meetings already . . . but this is one that they not only don't miss, but that they actually *like* to go to!"

In addition to sustained high attendance and positive word-of-mouth about the series, four other key results could be identified. The first result was that this series created a safe place for managers to engage in ongoing "sensemaking" about the organization and their respective roles within it. It is important to remember that these managers operated in a highly ambiguous environment as a business-to-business e-commerce company (a new business model for which there were no clear paths relative to strategy and management). In addition, this same group experienced emotions ranging from those associated with very rapid growth, when they couldn't hire people fast enough and 16-hour days were the norm, to those related to the equally rapid descent, during which more than 300 employees (out of a high of 450) were laid off within six months and the company simultaneously struggled to re-create itself as a software and services company. Thus, the community established by this ongoing series served as a bedrock for many of these managers, a constant through which they could evaluate, reflect upon, and discuss the topic at hand as it applied to their own situations.

The second result was that this group served as a community-building and networking mechanism whereby the members could learn from one another and tap into each other's experiences and expertise to help solve real problems. The Rx portion of these meetings provided a formal manner in which to do this. However, networking and learning from each other also occurred as the managers ate lunch, in their small group breakouts, and in conversations that continued in the hallways and offices after the meetings.

Third, this group embodied many of the principles of action learning in that they identified and followed up on issues and opportunities that arose from the group discussion. For example, the group articulated a frustration with how to approach career development in a relatively flat organizational structure. As a result, several of them participated in the formation of a formal organizational mentoring program. The group also indicated a desire for some sort of organizational rewards and recognition program. As a result, a small subset of the members brainstormed components of such a program and then helped to ensure its success by supporting it when it was rolled out to the entire organization.

Fourth, as can be expected with a group such as this, the members had many questions about where the organization was going and how it was to get there. Therefore, the group came up with a process to ensure that their voices were heard at the highest levels of the organization by the CEO, CFO, and CIO. These executives did not typically attend the meetings due to time constraints as well as to a desire to keep them as a "safe" space in which the other managers could raise their voices and work through issues. After each meeting, one of the attending managers would accompany me to the next senior staff meeting, where we would present what had been discussed at the meeting as well as any questions or suggestions that had emerged. We would then follow up to the group with an email report of the senior staff's responses or suggestions.

Finally, as I mentioned earlier, this group was an invaluable resource to me as the organizational effectiveness leader. The meetings operated as an ongoing "sensing" session for determining the needs and issues within the organization—something that served to keep me up to date and informed about what employees were thinking and feeling. In addition to providing this ongoing information, the meetings also provided feedback for proposed organizational effectiveness interventions. If I incorporated the attendees' suggestions (which was almost always the case), they provided critical support for these interventions as they were rolled out to the organization. Over the course of my career, I have seen many training and organizational effectiveness initiatives sabotaged by managers because the interventions were not relevant to them or they were not involved in the process as key stakeholders, so I particularly appreciated the relative ease of implementing changes in this organization. The group's participants also served as a solid public relations mechanism for me in that they publicly praised the series and the results that emerged from it to their managers as well as to mine (the vice president of HR). In a pragmatic, political vein, this widespread support and endorsement for the work done in organizational effectiveness was critical during this time of change and layoffs.

Lessons Learned and Recommendations

The most significant lesson was one I had already learned: If the learners are actively engaged in designing a program (from the perspective of both content as well as format) for themselves, then they will buy into it and be fully engaged (at least at the outset). As a facilitator, it was important that I continue to ask the hard questions along the way about whether or not the series was working for them and what should be changed to keep it relevant for them. Then, it was important that I followed through on the changes. I also went out of my way to point out these changes, and the fact that they had come as a result of feedback from the group. When possible, I acknowledged feedback and contributions from individuals, as well.

Although the group only met for two hours during the lunch period every other month (which doesn't sound like a lot of time for management development), it seemed adequate to me and to the group. The lesson learned here was to create opportunities for structured-on-the-job learning wherever they present themselves and wherever they work best for the learners. Although creating learning was a major aspect of my job, it was a small part of the reality of my internal clients, so it was important that I respected the time they could give me. In addition, I did all I could to make attending these sessions as convenient for them as possible. Examples of this included having the meetings over the lunch period, a time in which they typically did not have many meetings. Also, I purchased lunches for them (which were typically sandwiches or pizza) so managers wouldn't skip the meeting because they were hungry. In addition, because Ludlowe was an email-intensive culture, I "booked" the meetings on their respective calendars via Outlook so that they would be reminded of them. Finally, I respected the allotted time and never ran over the two-hour period. I posted an agenda with the times for each activity, and used my facilitation skills to keep the meeting moving so the time we had together was used in optimal fashion.

Another lesson was to appreciate the fact that structured on-the-job learning can and does meet needs for the learners that extend beyond learning. For example, this series met a networking need for the learners in that it provided them an opportunity to interact with people with whom they did not normally work. It also met a need to work through and make sense of pressing issues in a safe space—one that was jokingly referred to by some of the managers as "therapy." It also met a need for action in that all of the sessions were wrapped up with a "next steps" discussion of what the group was going to do with the information that had been generated. As a result, a number of actions ensued—actions that for most managers validated the time and energy they spent in these sessions as having been, in their words, "worthwhile."

Another lesson was that this learning venue served as an ongoing focus group of sorts. It provided me a regular opportunity to capture what Kurt Lewin calls "generative themes"—what was on their minds relative to the business and other learning needs. In addition, the sessions provided a way for me to test ideas and concepts with this influential group and get their feedback and ultimate buy-in (if I incorporated their feedback) when I moved forward with an idea. For example, I designed the formal rewards and recognition program (the idea for which came from this group) and then ran the program design past the group. They were enthusiastic about it and had a number of good suggestions to improve it. I took their suggestions, and the program ended up being a huge success when it was rolled out to the entire company. Because the managers supported it, and because they possessed a degree of power within their respective organizations, they were able to drive the implementation successfully throughout the company.

A final lesson was that management development doesn't have to be expensive. Many HRD practitioners tend to budget the larger portion of their budgets to management and leadership development (at least I had) and assume that the only way to go about this is to bring in expensive training vendors. However, this learning series cost very little to implement—just a few lunches and some books here and there. For the most part, the managers served as the true subject matter experts, which eliminated the need for me to hire expensive external subject matter experts.

Questions for Discussion

1. How is this similar to or different from structured management development that you have facilitated in your own organization?
2. What do you see as the strengths of this program? Where could it have been improved?
3. This learning series was very learner intensive in that the learners designed the content, and specified the preferred format. Would you feel comfortable structuring something similar to this in your organization? Why or why not?
4. What were the potential issues or flaws with a learning design that was so heavily determined by the learners?
5. In what ways might you have structured the sessions themselves differently?
6. For the most part, middle managers were the primary participants in this learning series. What was gained as well as lost by not having more senior managers present?

The Author

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