



Leading organizational learning: Reflections on theory and research

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ABSTRACT

This essay conveys some of the author's ideas about the influence of leaders on organizational learning. Limitations of some well known leadership theories for explaining this influence are described, and ideas for developing more comprehensive and accurate theories are suggested. Examples of specific ways leaders can influence organizational learning are provided. The methods used for most of the research on the subject are evaluated, and some alternative methods are suggested.

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1. Introduction

Organizational learning has been defined in many ways, but a core aspect of most definitions is collective learning by members of the organization. Essential processes include the discovery of relevant new knowledge, diffusion of this knowledge to people in the organization who need it, and application of the knowledge to improve internal processes and external adaptation. Successful application of new knowledge includes institutionalizing it in a way that will ensure it is retained as long as it remains relevant.

Organizational learning is an important determinant of long-term performance and survival for organizations, but many companies seem unable to master the learning processes. Despite the substantial amount of research and development conducted by large organizations, the source for many innovative products and services is individual entrepreneurs or small businesses. Even when important innovations come from large organizations, the initial work is often done by individuals who do not have formal authorization and must overcome strong resistance to gain acceptance for their ideas.

Failures in organizational learning may involve weaknesses in any of the core processes of discovery, diffusion, and application of new knowledge. Some organizations make little effort to improve inefficient procedures or poor customer service, even when the necessary knowledge is easy to find and apply. Sometimes effective practices are discovered in one subunit of an organization, but they do not get implemented in other parts of the organization where they are also relevant. For example, the Australian division of a multinational company established a program that increased market share by 25%, but the knowledge was not applied in the European and U.S. divisions where the benefits would have been even greater (Ulrich, Jick, & Von Glinow, 1993). Sometimes important discoveries are made in an organization, but top management fails to recognize their potential value, and the knowledge is never used in the organization. For example, Microsoft and Apple earned millions of dollars in profits from the sale of computers that incorporated unused discoveries made in a Xerox research facility (Smith & Alexander, 1988). Sometimes an organization implements best practices for avoiding accidents or serious problems, but the practices are later abandoned and the organization eventually has a disaster that could have been prevented.

Research on organizational learning involves scholars from several disciplines and areas of specialization, including organization theory, organization behavior, industrial and organizational psychology, strategic management, and change management. Researchers have explored how leaders influence collective learning in teams and organizations, and the number of empirical studies on the subject is increasing (see Berson, Nemanich, Waldman, Galvin, & Keller, 2006). This essay will suggest some issues and research questions that deserve more attention and some research methods that should be used more often in the

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search for answers. I also point out some limitations of well known theories such as transformational and charismatic leadership for explaining how leaders influence organizational learning.

2. Ways leaders influence collective learning

One of the greatest challenges for leadership at all levels in organizations is how to create the type of conditions that encourage, facilitate, and sustain a favorable level of innovation and collective learning. Leaders can directly encourage and facilitate collective learning by what they say and do, and they can indirectly influence it by implementing or modifying relevant programs, systems, and structures (Yukl & Lepsinger, 2004). Researchers and practitioners have identified many ways leaders can encourage and facilitate the process of collective learning in organizations, and some representative examples are shown in Table 1.

3. Relevance of popular leadership theories

Understanding organizational learning will require multi-level theories and research, and it is essential to include collective processes at the group and organizational levels. Dyadic theories have dominated the traditional leadership literature for decades, and theories of team leadership, strategic leadership, and shared leadership did not get the attention they deserved. How a leader influences individual subordinates is relevant, but it is more important to understand how multiple leaders influence collective learning by teams and organizations. The potential of dyadic theories for explaining leader influence on collective learning is very limited, and the theories sometimes distract attention from the most important influence processes.

An example is transformational leadership theory (Bass, 1985), which was formulated initially to describe how a leader can influence the motivation of individual followers and increase their performance. The core leadership constructs are two broadly defined behavior categories called transformational and transactional leadership. Transformational leadership involves motivating individuals to do something different than before, or to do more than initially expected. It is an important form of leader influence, but the theory does not clearly explain how leaders can influence collective learning. The Multifactor Leadership Questionnaire (Bass & Avolio, 1990) used in most research on transformational leadership does not explicitly measure most of the leadership behaviors that are relevant for enhancing organizational learning. Furthermore, the emphasis on a single leader's direct influence on subordinates distracts attention from the shared influence of multiple leaders (Pearce & Conger, 2003), and from the influence of leaders on programs and systems that are relevant for collective learning (Yukl & Lepsinger, 2004).

Charismatic leadership (Conger, 1989) is another popular theory with limited utility for explaining organizational learning. Attributed charisma can increase a leader's influence, but this influence may not be used to enhance collective learning and increase long-term organizational effectiveness. There is ample evidence that charismatic leaders can have negative effects on an organization (Conger, 1989; Finkelstein, 2003; Hogan, Raskin, & Fazzini, 1990). A leader who is widely viewed as extraordinary can impede collective learning by followers who expect the leader to know what is best for the organization. Followers are less likely to challenge the leader's decision to pursue a risky new initiative or strategy, and they are less likely to report information indicating that it is failing.

Instead of trying to extend dyadic theories of leadership to explain organization-level processes, it is much better to develop new conceptual frameworks that are more relevant and comprehensive. Promising ideas can be found in several emerging theories of organizational leadership that include ideas from other literatures as well as the leadership literature (e.g., Balkundi & Kilduff, 2005; Uhl-Bien, Marion, & McKelvey, 2007; Yukl, 2008). Relationships discovered in empirical studies of learning in teams and organizations provide another source of ideas for inductive development of theoretical propositions about the potential influence of leaders on this learning (e.g., Berson et al., 2006).

Table 1

Examples of ways for leaders to enhance organizational learning

- Encourage people to question traditional methods and look for innovative new approaches that will be more effective.
- Articulate an inspiring vision to gain support for innovative changes from members of the organization.
- Encourage and facilitate the acquisition of skills needed for collective learning by individuals and teams.
- Strengthen values consistent with learning from experience and openness to new knowledge, thereby helping to create a learning culture in the organization.
- Help people develop shared mental models about cause-effect relationships and the determinants of performance for the team or organization.
- Encourage social networks that will facilitate knowledge sharing, collaborative development of creative ideas, and the acquisition of political support for innovations.
- Help people recognize when important learning has occurred and to understand the implications for the team or organization.
- Gain external support and financing for major initiatives involving the acquisition or application of new knowledge (e.g., acquisitions or joint ventures).
- Encourage experiments to gain more knowledge about the likely effects of changes before implementing them on a large scale in a way that cannot easily be aborted.
- Encourage teams to conduct after-activity reviews to identify effective and ineffective processes.
- Develop measures of collective learning and knowledge diffusion to assess how well it is accomplished and identify ways to improve it (learning how to learn).
- Encourage people to acknowledge when a new initiative is failing and should be aborted rather than continuing to waste resources on it.
- Create decentralized subunits with considerable authority to pursue learning and entrepreneurial activities in a responsible way.
- Develop, implement, and support programs and systems that will encourage and reward the discovery of new knowledge and its diffusion and application in the organization.

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