



**Creating Learning Organizations: Integrating the Five Disciplines**  
**By Marty Jacobs**  
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As I sat down to begin writing this final article about learning organizations, I received a very timely inquiry via email. It was from an engineer in India who works for one of the world's largest power companies. He had been charged with turning his unit into a learning organization and had been studying various books and journals. He read my articles about learning organizations on my website and was wondering if I might be able to shed more light on the subject. Wow! Was that a tall order, not only for me but also for him! Where to start? That's a question every organization needs to ask.

The concept of a learning organization is still in its infancy. Some would even argue that it is an unattainable ideal. Perhaps that is a fair statement at the moment, but statements like that have fallen by the wayside over and over again throughout history: people would never be able to fly, no one would ever break the four-minute mile, humankind would never set foot on the moon – the list could go on and on. One of the core characteristics of learning organizations is to challenge assumptions like these.

Before expounding on creating a learning organization by integrating the five disciplines, let's first review the five disciplines of organizational learning:

- **Personal mastery:** Personal mastery is the ability to continually clarify and deepen personal vision, focus energies, develop patience, and see reality objectively. The focus in personal mastery is on individual learning.
- **Mental models:** Mental models are deeply ingrained assumptions or generalizations that influence how we understand the world and how we take action. Working with mental models involves surfacing and examining organizational assumptions, in order to understand organizational systems better and to develop more effective solutions.
- **Building shared vision:** This discipline entails building and holding a shared picture of the future and developing the capacity to meet that vision. It begins with individual visions that are used to co-create the shared vision.

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- **Team learning:** Team learning involves engaging in dialogue and the process of thinking and learning together. It cannot happen without first focusing on individual learning.
- **Systems thinking:** Systems thinking, what Senge refers to as the “fifth discipline,” is the cornerstone of organizational learning that ties the other four disciplines together. In a nutshell, systems thinking is the study of system structure and behavior. It focuses on the interrelationships of organizational systems, looking at the whole rather than the individual parts.

In order to begin integrating these disciplines, an organization must first create the following conditions:

- A safe and open environment
- A culture that encourages and rewards risk-taking
- An orientation that is positive and forward-thinking
- An ability to tolerate delays and uncertainty
- An ability to focus on long-term outcomes rather than short-term gains or fixes
- A culture that challenges the status quo
- An atmosphere that encourages inquiry, curiosity, and reflection, not conformity
- An organizational structure that encourages self-direction and self-evaluation

Without these conditions, a learning organization cannot thrive. Although this may seem like an overwhelming task (indeed, for many organizations creating these conditions is a major cultural shift), there are some tools that exist to help. The first step in creating a learning organization is to make a careful assessment of current reality. What is it that you do well as an organization and what more could you be doing? In the book *Ten Steps to a Learning Organization*, the authors include an assessment tool (pp. 61-67) that can be used to focus your efforts.

The assessment will shed light on underlying assumptions that need to be challenged. Some of those assumptions might include the following:

1. There will always be organizational politics (those with power and those without), so we might as well get used to it. People will exercise that power based on self-interest.
2. An organization must be controlled and directed by tightly controlling its employees.
3. Time spent at an organization must yield product or service; time spent in learning or reflection is a luxury and hard to come by.
4. Work inevitably conflicts with personal lives, and organizations have no responsibility in improving the balance between the two. Therefore, employees must separate their personal lives from their professional lives.
5. The best way to learn is through real world experiences, that is, through performance.
6. Effective leaders are those who set the direction, make key decisions, and rally the troops.

The process of creating the conditions for a learning organization and of challenging long-held assumptions will itself begin to integrate the five disciplines. Let's take a closer look at each of the above assumptions with respect to the five disciplines.

For many organizations, politics are, sadly, a way of life. However, the consequences of playing politics are often disastrous. Decisions about scarce resources are made based on who has power, not on the desired outcomes for the organization. To change this culture, organizations need to clarify values or guiding principles. How do we want to operate as an organization? It begins at the level of personal mastery and ends with shared vision. Employees need to be able to articulate their personal visions and mesh them into an organizational vision. Decisions must then be made based on their ability to move the organization toward that vision. This requires that leadership truly believe that people want to contribute and be part of something larger than themselves.

The perceived need for tight organizational controls dates back to the days of scientific management. It is a history we are still trying to shake. The control that is needed in a learning organization is not through hierarchy but rather through learning. Organizations need to invest in improving the quality of thinking and the capacity for reflection in its employees. Personal mastery will help employees develop the ability to respond effectively to decision-making. Systems thinking will enable them to see the bigger picture. Ultimately, the work of executives must become more visionary. They must gain a greater understanding of the forces driving change and design the learning processes to help employees understand these driving forces.

The priority that organizations place on measurable productivity also dates back to the days of scientific management. We tend to be an action-oriented culture, so any sign of inactivity is deemed to be unproductive. Albert Einstein, however, recognized the fallacy in this thinking with the following quote he hung in his office at Princeton: "Not everything that counts can be counted, and not everything that can be counted counts." Once again challenging this assumption leads us to personal mastery. Top managers need to model the behavior that learning and reflection are not only valued but are critical to the success of the organization.

Separating professional and personal life is an expectation that has evolved in our society. In an agrarian economy, it was neither possible nor necessary to create such a separation. As we became a more urban society, however, with most people leaving home to work, those boundaries, artificial as they may be, seemed more reasonable. Today, we appear to be moving back to more integration. Indeed, systems thinking is all about integration of the whole. A shared vision, in order to truly be shared, must be based on the integration of personal visions, and those personal visions include both personal and professional goals. Personal mastery is about ALL aspects of life, not just work life. Ultimately, both individuals and organizations must take responsibility for challenging this assumption. Individuals must set their personal goals, communicate them, and stick to them. Organizations must create a structure and culture that will provide employees with guidance and support in achieving those goals.

It used to be that learning on the job was the best way to learn a job. Today, however, as we evolve into more and more of a global economy, organizational life has become both extremely

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complex and fast-paced. That means that learning as we go along can be costly, both in terms of actual dollars and in terms of market share and lost opportunities. Team learning is the key to challenging this assumption. Teams need to be able to create “learning labs” in which to practice skills. These labs may be as simple as role-playing or as complex as computer modeling. Regardless, the ability to test ideas in realistic situations without fear of failure is crucial to organizational learning.

In learning organizations leaders take on radically different roles. They create a commitment to the whole, not just the individual parts by engaging in and modeling systems thinking. They involve their employees in capacity building, both their own and the organization’s. Leaders in learning organizations take on a more facilitative or consultative role: making sure their employees have the resources they need to accomplish both individual and organizational goals and guiding them to keep the bigger picture in focus. The most effective leaders are skilled at modeling all five disciplines.

Creating a learning organization by integrating the five disciplines is really about changing organizational culture. In order to make such a change we must first begin to change our thinking. Once our thinking begins to shift, we can start making behavioral changes. As more behavior changes in an organization, the culture begins to shift. When that cultural shift finally begins to happen, the possibilities begin to open, and the sky is the limit.

Resources:

*The Fifth Discipline: The Art and Practice of The Learning Organization*, Peter M. Senge, 1990.

Society for Organizational Learning (SoL) (<http://www.solonline.org/>).

*Ten Steps to a Learning Organization*, Peter Kline and Bernard Saunders, 1998.

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