

## Beyond the Ropes: Guidelines for selecting experiential training

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Experiential training and development (ETD) services have continued to grow and evolve over the past two decades. Accounting for an estimated \$100 million to \$200 million in the overall business training industry in 1999, these "activity-based" training approaches have become increasingly diverse, high-profile and occasionally controversial as they are applied in more settings by more mainstream trainers and consultants.

According to one study, 57.7% of ETD approaches can be defined as indoor experience-based games and simulations (e.g., programmed cognitive problem-solving scenarios and indoor group initiative tasks); 17.3% as outdoor-centered (e.g., ropes courses usually in a camp or resort setting); 9.6% as outdoor experience-based (e.g., physical problem-solving activities using portable equipment for only part of an overall program); and 4.8% as wilderness type (e.g., participants living outdoors and doing war games, rafting, orienteering, etc.).

### Best practices guidelines

Given the growing numbers of ETD providers (and would-be providers) in the marketplace, how can we judge the safety, relevance, business applicability and effectiveness of these services and the professionalism of their providers?

A group of seasoned providers of experience-based training and development services formed a task force in 1997 under the auspices of the Association for Experiential Education to develop guidelines in this area. The panel sought input from 2,400 colleague organizations, organizational clients, and other professionals in an attempt to define the field of experiential training and development; identify best practices in the three areas of service, and establish ethics in this growing and uneven field of training practice.

It is helpful to first define what characterizes "experiential" training and development approaches. The task force agreed that it is a unique synthesis of knowledge from the fields of experiential learning (e.g., Kolb's action, reflection, application cycle), adult learning, and organizational development. ETD is further defined as client-centered and revolving around the notion that intellectual insight, understanding, skill acquisition, and growth/change motivation best occur in the context of active, engaging, challenging and emotional learning experiences.

Accordingly, ETD has taken various forms where challenging, fun and usually physical activities are staged for groups of participants, followed by some form of reflection and application. Typically a group receives instructions on a challenge or problem to solve; followed by their own activities in team definition, communication, problem solving and implementation; and then a debriefing of their performance and subjective experience.

But any one experience on a ropes course, say, does not necessarily equate to another (depending on program goals, outcomes, and design of the work). An organizational consultant engaged to assist in blending cultures of a merged business entity over time will design, use, debrief, and apply experiential activities differently than the facilitator charged with enhancing team members' knowledge of each other and developing esprit de corps.

### Three areas of practice

The task force identified three distinct areas of ETD services, as well as differing levels of requisite skill, knowledge and experience a provider must have to effectively (and ethically) deliver value to the client. These are defined here and detailed in the sidebar below.

- **Relationship Development** -Services that enhance interactions and motivate individuals through short-term events. Examples include energizing, incentive-reward, networking and celebration events.
- **Performance Enhancement** -Training in skills and competencies that results in improvement in personal, team and organizational effectiveness. Examples include communication skills, coaching, performance management and conflict resolution.
- **Consultation / Intervention** -Services that identify and develop behavior that supports business system elements (e.g., values, mission, structures, processes) and helping align these elements to support the desired behavior. Activities include identifying opportunities for improvement, customizing simulations to isolate business system elements and coaching, and facilitating the human performance side of organizational change.

### Concerns

A review of the literature on ETD over the past decade tells a mixed story in terms of success. Analysis of the criticisms reveals that often times a relationship development application in depth, time and focus was employed when, in fact, a consultation/intervention level of service was needed to achieve the objectives. Lack of adequate knowledge of business

and organizational context by the EDT provider has been a common concern.

Other issues rightfully raised have included exclusion of participants by the physical design of activities; the failure to mitigate against peer pressure; the lack of a true "challenge by choice" playing field; and the failure to address the different learning and development needs of the group and organization.

The concern that some outdoor, adventure-based "team building" or "leadership development" programs didn't work (or produced temporary results) often betrays the following facts when examined closely. Oftentimes, individuals and/or teams were facilitated into operating at their highest and best in the retreat environment, only to then be sent back to the same work environment without modifications to things like reporting lines, team compositions, problem-solving processes, incentive-reward systems, etc. In other words, there was no supporting structure for the beneficial behavior. Furthermore, the facilitator sometimes does not have adequate knowledge about, and experience with, the business context to promote transfer of learning.

Too often the fun, engaging methodology has outweighed attention to the transfer to workplace issues for performance enhancement and consultation/intervention levels of ETD service - for both client and provider. There are plenty of notable exceptions to these shortcomings, and continuing ETD task force efforts will be aimed at promoting these highest and best applications.

### The promise of ETD

Daniel Goleman's recent book, *Working with Emotional Intelligence*, amply summarizes the significant financial impact of "soft skills" development in businesses. ETD can very effectively go beyond the limitations of traditional, classroom-based, cognitive approaches to self, social and work skill development.

This is due, in part, to the firm grounding ETD has in Dewey's and Kolb's learning philosophies and models. When historical concerns about the qualifications of providers and the appropriateness of design in skill development and OD applications are appropriately answered, ETD approaches may be woven into corporate university curricula and other training and development work for impressive results.

Ironically, an interesting challenge facing mature ETD providers today is largely a product of their own success. In the past five to 10 years, ETD has moved from the edges to the mainstream of the corporate training and development industry, and it also has become a staple of college and university orientation programs. As a result, it's not unusual for participants to arrive today with a "Been there, done that" attitude even before the engagement begins.

The best ETD providers are busy creating new models and activities, or variations of the tried and true, to serve and satisfy an expanding and evolving clientele. Experiential programming has moved quite beyond ropes courses in form, design and content. Some strategies currently being employed include:

- **Multi-tasking competitions.** To more accurately mirror today's fast-paced business environment, teams (sometimes totaling hundreds of participants) are challenged to work through several tasks simultaneously. Complex team skills such as goal-setting, decision-making, resource management, and making effective mid-stream corrections are the determinants of success.
- **Community and human service projects.** Want to see a team examine issues of motivation, purpose, or the dynamics of cross-functional collaboration? Set them loose with hammers, drills, paint brushes, shovels, etc., and you'll see it happen!  
Collaborative ventures with organizations such as Habitat for Humanity and the American Red Cross as they build a house or clean up an estuary are proving equally as challenging, fun and instructive as climbing a rope ladder or sailing a racing yacht.
- **State-of-the-art technology.** Teams may be challenged to locate their next activity using a set of coordinates and Global Positioning Systems (GPS) instruments; launch a "virtual ascent" of Mt. Everest, communicating and making life and death decisions on a computer network; or enjoy the relationship enhancing fun of large-scale, portable, inflatable corporate "playgrounds with a purpose."
- **Simulations.** Creative ETD consultants are collaborating with authors and clients to develop experiential activities that illustrate specific learning content (Covey's seven habits; Senge's learning organization; etc.) as well as to mirror work structures and processes in organizations.

However, no matter what changes occur in the field of ETD, two principles remain the same. At its essence, ETD is about (1) people connecting with each other and (2) discovering how to effectively turn ideas into action. Whether rock climbing or sheet rocking, navigating through whitewater or through hyperspace, the activity is secondary to the goal of helping people learn more about themselves and each other, and as a result to become more effective at what they set out to accomplish.

### Three Levels of Experiential Training and Development Service

There are three levels of ETD service as identified by the DEEP task force: Relationship Development; Performance Enhancement; and Consultation/Intervention.

## Relationship development

Every September, 650 students from around the world arrive in Chicago, Ill., to begin their graduate education at the distinguished and highly ranked Graduate School of Business at the University of Chicago. They come in as strangers in the common pursuit of an MBA.

In 1989, the LEAD (Leadership Exploration and Development) Program was established to balance out the quantitative bias of the curricula with the human side of leadership skills. The very first experience the incoming class goes through is "Breaking Boundaries," a full day of team initiatives. Students work in teams of 12, practicing the teaming skills necessary to compete in the upcoming main event of orientation, the 24-hour business simulation called the "Dean's Challenge." Students use interactive learning processes to hone their skills of communication, creating common goals, making decisions, planning and executing, using feedback and mastering their diversity of perspectives and intellect.

Breaking Boundaries is designed to accelerate the building of collegial relationships, expose the diversity of leadership assumptions from many cultures, and let people practice effective team and leadership skills while removing the awkwardness of being new to each other and their environment for two years. The spirit of the incoming class is unleashed in a fun and playful day of learning.

## Performance enhancement

Over the past three years, Ernst & Young Management Consulting's EXEL (Executive Entry Level) program has combined ETD with traditional case study orientation and training activities for hundreds of their newly hired partners and executive level consultants.

This six-day performance enhancement training has intact teams navigating their way through strategic decisions (e.g., who to send to critical and limited 45-minute skill training seminars), managing the dynamic tension between client demands (a surprising "moving up" of a deliverable deadline) as balanced against internal drivers (the HR manager's request for a real time "lessons learned" document during the simulation) and contributing to and accessing a "business knowledge center" (mirroring an actual E&Y structural entity) - all while moving among successive "client engagements" in the Arizona desert.

Throughout the day, there is an emphasis on team facilitation. Team members use detailed learning journals to continually monitor and improve communication, leadership, decision-making, customer value management, etc., skills through a set of self-evaluative scaling questions and debriefing sessions.

## Consultation/intervention

A software vendor had encountered "resistance and other obstacles" with all the HR department clients whom they had attempted to help implement a new online recruiting and screening tool. They requested an experiential "team building" service from a consultant to help them improve success with their next client.

The training consultant had expertise with organizational development and was familiar with the human performance issues around the re-engineering of job roles and work processes. He had learned experiential team building methods, and noted that earlier in his career he may have suggested some low elements of a ropes course to meet the client's request.

Instead, based on a more experienced perspective, he proposed that the software vendor and he co-create an experiential simulation to mirror the transition from the old organizational processes, HR roles, and interpersonal challenges their clients typically encountered. The result was heightened awareness by both vendor and client of the predictable challenges before they occurred, a "Guidelines for Engagement" document containing their agreed-upon behavioral commitments to get through the cycle of technology adoption, and an action plan for preventative leadership, communication, conflict resolution, and success measurement activities they would implement.

## What to look for in ETD providers/consultants

A good experiential training and development provider should:

- Match approach and provider qualifications with needed level of service.
- Specify what successful outcomes look like (immediate and longer term).
- Verify program's design for inclusivity and transfer of learning.
- Look for appropriate assessment and follow-up/support elements.
- Identify and address other systemic elements involved in helping transform and support changes.
- Ask for references and examples of best work in past, similar engagements.