

Applying Lewin's Change Model in the Development of a Learning Organization

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Abstract

The purpose of this paper is to describe how Lewin's 3-stage planned change model can be applied to the development of a learning organization. A review of the learning organization literature is provided, along with an articulation of how Lewin's concepts of unfreezing, movement, and refreezing can be applied to building and sustaining a learning organization. Research propositions are developed that may stimulate future research that can continue to contribute to the scholarly literature in the organization development fields. Practical insights are offered that may be beneficial to leaders, managers, and organizational development professionals charged with creating learning oriented environments.

Key words: Learning Organization, Lewin's Change Model, Organization Development

Introduction

Globalization, changes in the economy, the diverse workforce environment, and use of information technology have made organizations pursue learning at multiple levels within organizations as a competitive advantage. The importance of learning, innovation, developing a competitive workforce, and structures that can adapt the to changing landscape of the business environment have been acknowledged in the management, human resource, organization development (OD) fields (Kontoghiorghes, Awbrey & Feurig, 2005; Worley & Feyerherm, 2003). In particular, within the human resource and OD literature, the concept of a learning organization has been promoted as a strategic approach for transforming organizations to increase competitiveness through generative learning. This concept has been considered an important strategic intervention but one that is still in a formative stage of development (Cummings & Worley, 2005) Therefore, the ability to successfully manage processes associated with the strategic transformation of organizations into learning organizations has become an important issue in the human resource and OD fields.

Becoming a learning organization is a large-scale OD and transformation endeavor that fundamentally requires new structures, systems, and new ways of behaving and thinking (Watkins & Golembiewski, 1995). Saru (2005) has pointed out that such organizational-level change and transformation of learning initiatives may be facilitated under a clear linkage between OD strategy and strategic human resource practices. However, limited research has been given to exploring how organizations can improve and adapt to such planned change. Further little research has examined the relationship between OD interventions and the learning organization concept (Moilanen, 2001).

During the organizational change process, organizations may face different problems and barriers in different stages. Beer and Nohria (2000) have pointed out that approximately two-thirds of transformational change projects fail because of ineffective direction in the change processes. Therefore, organizational leaders need to understand what stage they are in now, and how change or transformation can be implemented effectively in the current stage. During the 1950s to 1970s, Kurt Lewin's planned change approach attracted scholars' attention and has been widely recognized an approach to plan and manage change (Burnes, 2004b; Cummings & Worely, 2001). A planned change model often serves as a change process roadmap that provides leaders and OD practitioners with a guideline to diagnose an organization's current status and propose solutions and interventions. Burnes (2004a) has indicated that Lewin's planned change model includes four elements: field theory, group dynamics, action research, and the 3-step model of change. Lewin's 3-steps model has long been viewed as a seminal contribution to the OD field (Burnes, 2004a) and most change models and approaches are similar to Lewin's 3-step model (Elrod & Tippet, 2002).

However, since the 1980s, Lewin's 3-step model has been criticized and challenged as being too simplistic, mechanistic, and reflective of a static change process as well as overly focused on a top-down change approach (Burnes, 2004a). These criticisms appear to be attributed to misreading and misinterpretation of Lewin's work. Instead of viewing change as a predictable process, Lewin has recognized the unpredictable and non-linear are the nature of change (Burnes, 2004a). In addition,

Burnes (2004) has argued that it would be more accurate to say that Lewin's model can be initiated from the top, the bottom, or the middle level; above all, it needs every member in the organization to participate in the process to achieve successful change. Similarly, Yeo (2005) has argued that a learning organization can be effectively formed when the change activities and transformation process are viewed as a collective work. Since the main purpose of a planned change process is to increase an organization's capability to change itself, Lewin's change model offers considerable insight and utility in as applied to the development of a learning organization.

Therefore, the purpose of this paper is to adopt Lewin's change model as a tool to investigate the interventions and practices that an organization may consider when implementing the learning organization concept. The researchers integrate and synthesize existing literature to propose propositions about how OD practices and interventions may be developed under each of the Lewin's 3-step model to facilitate the transformation of an organization into a learning organization.

The Learning Organization

The concept of the learning organization is not new and was popularized by Senge's (1990) publication, *The Fifth Discipline*, in which he has described the five components: systems thinking, personal mastery, shared vision, team learning, and mental models that are required to build learning organizations and has advocated new roles for leaders in creating such new organizational realities. The learning organization concept emphasizes being a community that encourages individuals in the organization to collaboratively create and share knowledge. In the learning organization literature, scholars have predominantly focused on defining and describing the learning organization conceptually. Although the term learning organization has been variously defined from a wide range of perspective since 1990s, there is commonality among those definitions and concepts. Marsick and Watkins (1994) have concluded that continuous learning, aspects of goals or performance, and transformation are reflected in most definitions and conceptions of the learning organization. In addition, they proposed different levels of action imperatives required to create a learning

organization. At the individual-level, individuals are motivated to create continuous learning opportunities, and promote inquiry and dialogue. At the team-level, the organization encourages collaboration and team learning. At the organizational-level, the organization creates systems to share knowledge and learning, and empower members towards a collective vision. In other words, a learning organization can be viewed as a transformation phenomenon with multiple-level involvement in enhancing learning and knowledge generation. A review of literature indicates that a learning organization is generally characterized as having a flexible organic organization structure, a continuous learning culture, and leadership that facilitates knowledge acquisition, distribution, integration, and creation among individuals, teams, and the organization (Gardiner & Whiting, 1997). Nevis, DiBella, and Gould (1995) have indicated that these characteristics may be promoted effectively through a planned change process. As a result, the planned change process along with OD interventions may be the blueprints for creating a successful learning organization transformation (Cummings & Worley, 2005).

Lewin's Change Model in Learning Organization

The researchers adopt Lewin's 3-step model: unfreezing, movement, and refreezing stages, to solve problems, to improve performance, and to reframe shared perceptions. The following sections delineate each stage and synthesize learning organization literature to suggest practices and strategies to achieve it.

Stage I: Unfreezing

For Lewin, there is a quasi-stationary equilibrium on human behaviors acting as either driving or restraining forces toward change events (Burnes, 2004; Lewin, 1947). In other words, an organization might face difficulties that organizational members within the system suffer a process of "disconfirmations" in the unfreezing stage thus resist changing (Cummings & Worley, 2005). Therefore, in the unfreezing stage, the main focus is to reduce the forces that try to maintain an organization's behavior at its present level. Schein (1999) has indicated that most organizational

change projects fail in the beginning stage, the unfreezing stage. It is because organizations neglect the importance of organizational members' attitudes and beliefs that play a critical role in determining the success of organizational change.

The concept of unfreezing is similar to the concept of "creating readiness for organizational change" (Armenakis, Harris, & Mossholder, 1993). Choi and Ruona (2009) have proposed that organizational members with a higher level of readiness for change are more likely to support and accept new changes. Since a learning organization is a system-level transformation, it is based on the premise that individuals in the organization not only understand the necessity of becoming a learning organization but are also willing to support the learning orientations. Moreover, motivating change and creating vision are two key activities in the unfreezing stage. Organizational leaders need to introduce information about the learning organization to motivate organizational members to become involve in the planned change. Burnes (2004a) has emphasized that an individual's inner realization of the importance and necessity of change determines the success of change project. Elkjaer's (2001) empirical study has indicated that employees who perceive a lack of support from the organization tend to have negative responses and little commitment and trust toward the learning organization transformation processes. Schein (1996) has also pointed out that the creation of psychological safety is the most crucial to achieve unfreezing and increasing employees' perception of readiness for change. Especially in the learning organization literature, psychological safety has long been viewed as a main factor in building a supportive learning environment (Garvin, Edmondson, & Gino, 2008). Ultimately, in the unfreezing stage, the success of an organization transformation relies on employees' readiness toward major learning and change initiatives in an organization's environment (Cummings & Worley, 2005).

OD practitioners also often diagnose and examine the interactions among inputs, design components and outputs at organization, group and individual level in the unfreezing stage (Cummings & Worley, 2005). The external environment, organization strategic orientation, and

organizational effectiveness and performance are described as organization-level inputs, design components, and outputs, respectively. At the organization-level of diagnosis, OD practitioners are often concerned with the fit between the elements of external environment (inputs) and the organization's strategic orientation. Argyris's (1977) concepts of single-loop learning and double-loop learning can be applied to the diagnosis processes. When an organization perceives the disconnection between external environment and its internal design component, and recognizes there is a need for organization change, an organization's learning to achieve change can be divided into two types: single-loop learning and double-loop learning. Single-loop learning occurs when the external environment changes, an organization take action for organizational internal design to match the external environment. However, the action and feedback in single-loop learning is passive. In other words, organizational change and development is adoptive not adaptive. The essential of single-loop learning is similar to Fiol and Lyles (1985) lower level learning, which focuses on the incremental organizational adoption. Compared to single-loop learning, double-loop learning places stress on the critical reflection of organizational members (Argyris, 1977). That is, organizational members question assumptions and challenge the change action and feedback through critical thinking. Heracleous (2000) has stated that double-loop learning requires that an organization fundamentally reconsider the way it thinks and acts. Double-loop learning is more adaptive than single-loop, and has been expressed by Fiol and Lyles (1985) as higher-level learning. Hence, the competency for an organization to be successful in the fast-changing business context is to become involved in higher-order learning to by questioning underlying assumptions and creating strategies that are aligned with the external environment rather than just focusing on the methods and tools to improve or to change. In other words, organizational learning and transformation is triggered by environmental and internal disruption.

At the organization-level diagnosis stage, top managers are responsible for the strategic direction and operation of the organization, and have an impact on an organization's design

components, such as strategy formulation and decisions on human resources system, technology system, and structure system (Cummings & Worley, 2005). Top managers establish organizational systems and formulate the firm's business strategy based on the information they acquire from external environment. Consequently, how top managers' interpret general environment and industry structure directly influences the organization's human resource, measurement, strategies and structure systems. Furthermore, Gnyawail and Stewart (2003) have argued that managers' mental model influence how they perceive the environment. Daft and Weick (1984) have also indicated that organizations must find ways to understand and interpret the environment that surrounds them. Daft and Weick's (1984) have assumed that strategic-level managers, a relatively small group at the top of the organization, formulate the organization's interpretation based on their beliefs about the external environment. Therefore, top managers' previous experiences and their hypotheses about the environment explain the differences in each organization's beliefs about the environment. Chio and Ruona (2009) have recently proposed that the employee's perceptions about the change strategies and readiness for change influence the change action. Thomsen and Hoest's (2001) empirical study on employees' perceptions of the learning organization has pointed out that employees can see the causality between frames for learning and a learning environment. Hence, a preliminary diagnosis is necessary to develop a learning organization in the unfreezing stage.

Proposition 1: In the unfreezing stage, (a) organizational members with a higher level of readiness for change are more likely to increase the success of the transformation process of becoming a learning organization (b) managers with a higher level of commitment to diagnosing the external environment are more likely to increase the success of the transformation process of becoming a learning organization.

Stage II: Movement

In Lewin's movement stage, an organization and its members engage in movement or actions through implementing OD interventions. Although scholars have conceptually articulated several OD

practices and interventions in the learning organization literature, few have been investigated empirically. Hence, the researchers focused on empirical learning organization literature and synthesize those OD interventions which have been demonstrated to be effective in building learning organizations.

Leadership. Wirtenberg, Abrams, and Ott's (2004) study pointed out that leadership development and teamwork are two important OD techniques and processes that have been discussed widely. Learning organizations depend heavily on effective leadership in the organization transformation process. Ng (2004) has indicated leaders should consider the "organization change model," which includes goals, business, culture, and processes to develop a learning organization. The focus of leadership in the learning organization is to learn, to teach, and to transform the organization as well as become responsible for supporting and facilitating the development of a learning environment (Driver, 2002; Ellinger, Watkins, & Bostrom, 1999; McGill, Slocum, Jr & Lei, 1992). In addition, a learning organization places emphasis on team learning, collaboration and sharing learning. Leaders should provide incentives and encourage teamwork, personal mastery, and system thinking (James, 2003). Moreover, since a learning organization promotes a climate of openness, leaders must be receptive to criticism and must frequently interact with members (Garvin, 1993; Nevis, Dibella & Gould, 1995). Senge (1990) has acknowledged that many ideas in the organization never get put into practice because of the conflict between such new insights and leaders' mental models. In other words, leaders in the learning organization actively promote openness, an experimental mind-set, articulate a vision, and act as a system-thinker. Leaders play critical roles in involving and leading the transforming into a learning organization.

A central belief in the learning organization literature is that leaders help people "embrace change" (Senge, Roberts, Smith, & Kleiner, 1994). Johnson's (2002) research has indicated that in the transformation process, leaders must clearly identify the need for increased leaning, then articulate this need to the organization in a way that make sense to organizational members. Leaders are

responsible motivating members to understand change. Senge (1990) has proposed that in a learning organization, the leaders' new role is to act as designers, teachers and stewards in building new skills, such as build shared vision, surface and test mental model, system thinking in order to help everyone in the organization to gain more insightful views of current reality and vision. Above all, such leadership should be developed through lifelong commitment (Senge, 1990). That is to say, only when leaders develop commitment to the organization can members be motivated to engage in such learning change activities.

In addition to leadership, empowerment also affects the success of a learning organization implementation (Gardiner & Whiting, 1997). Cooksey (2003) has acknowledged that "a leader's role in a learning organization is thus depicted as one of setting the context for learning, facilitating a supportive environment for learning, serving as a role model for learning, empowering others to action their learning and creating and sharing important meanings for the business and its members" (p. 207). James (2003) has proposed a 4Bs (belief, behavior, balance and boundary) framework to strengthen the learning organization web, components that are formed a learning organization. One of the 4Bs is "belief," which stresses transformational leadership and empowerment for every employee. James (2003) has argued that learning organization leaders design organizations into teaching organizations. Leaders disperse power to employees and employees engage in knowledge transfer, continuous learning and improvement, and decision-making. Thus, every employee is encouraged to be both a knowledge learner and a teacher. Within such an environment, everyone engages in constant learning. Employees not only learn but also transfer knowledge to others. Marsick and Watkins (1999) have stressed that only empowerment can create and develop a collective vision, which motivates employees to be highly involved in the organization. Empowering employees allows them to take risks, learn from mistakes, and contribute to the organization. Hence, empowering employees and by unleashing the power of leadership helps to create conditions that foster the development of a teaching and learning organization versus a command-and-control paradigm.

Reward System. The OD field has given attention to the design and implementation of reward systems (Cummings & Worley, 2005). Research on employee involvement has suggested that reward systems are as important as other organizational practices. Within the context of a learning organization, Thomsen and Hoest (2001) have examined employee perceptions and the relationship between learning interventions and learning environment. Their empirical study has pointed out that reward system, including reward flexibility and self-development opportunities, have a high effect on forming the learning environment. Moreover, Garvin (1993) has indicated that one of a learning organization's main activities is experimentation with new approaches. This activity involves the systematic search for and testing of new knowledge. As a result, an incentive system that favors risk taking would be an intervention that could increase experimentation for new ideas for organization improvement (Garvin, 1993).

Knowledge Management. Organizational knowledge, as a strategic asset, is an important lever for competitive viability and growth of an organization "skilled at creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights" (Bollinger & Smith, 2001; Garvin, 1993, p. 80). Knowledge management is a growing intervention in the OD literature, which contains the process of generating, organizing and distributing knowledge in the change process (Cummings & Worley, 2005). Garvin (1993) has pointed out that one of the main learning organization activities is that knowledge must transfer efficiently and quickly throughout the organization. James (2003) has stressed that employees must become knowledge workers in a learning organization. Each employee is responsible for mastering his or her own job, disseminating and sharing important information. Information technology acts as a medium of knowledge management system has been suggested in the literatures (Mattacks, 2003). Research has suggested that the use of information technology can be positive to information scanning, one of Pedler, Burgoyne, and Boydell's (1997) characteristics of learning organization model (Thomsen & Hoest, 2001). Gardiner and Whiting's (1997) empirical study has also demonstrated that information technology creates an

effective communication system that enables a learning organization to successfully use and share information throughout the organization. In addition, Kumar's (2005) empirical research has pointed out that new technology, information and communication technology (ICT), offer new opportunities for knowledge sharing and increasing access to learning in the organization. Therefore, the implementation of information technology systems that enhances the organization's ability to transfer and share valuable knowledge to achieve the organization-level learning may aid in the development of a learning organization.

Managing Workforce Diversity. Worley and Feyerherm (2003) have indicated that more diversity in the organization has become a trend that affects OD practice. Jamieson and O'Mara (1991) have emphasized that workplace diversity is not merely about ethnical groups, cultures, and minorities, but a strategic issue that is concerned with the results people with different perspectives, values, and resources in the workplace bring to workplace. Driver's (2003) empirical study investigated the relationship between group diversity and task accomplishment. Since diverse groups may have differences in values, it may increase the interpersonal conflict and become an obstacle to organization learning and progress (Driver, 2003). Therefore, Cummings and Worley (2005) have viewed workforce diversity management interventions to address such impediments to increase organization productivity and competitive advantage. Managing workforce diversity helps organizational leaders to be more responsive to a variety of individual needs, retain attractive groups, and to ensure that each organizational member has a safe environment to increase their interaction and collaboration to achieve learning.

Finally, in the movement stage, an organization's intervention adoption needs to be concerned with two issues: organization structure and organization culture. Wetzell and Buch (2000) have argued that organizational interventions should be congruent with the organization's structure. A learning organization tends to be a loosely and horizontally structured organization (James, 2003) because of the emphasis on team collaboration, knowledge transfer and sharing, transformational leadership, and

climate of openness. These features are important and should be considered when designing and building a learning organization. It is possible that more traditional and hierarchical organizations may need to be redesigned to during the transformation to become a learning organization.

Proposition 2: In the movement stage, (a) supportive leadership (b) an emphasis on reward systems and structures, (c) an emphasis on knowledge management systems, (d) managing workforce diversity, will increase the success of the transformation to a learning organization.

Stage III: Refreezing

Lewin's refreezing component in his planned change model indicates that an organization should be stabilized and institutionalized in a new state after the movement stage. Institutionalizing change is the final step but determines the success of change sustaining (Kotter, 1995). However, the sustainability concept has received limited attention (Buchanan, Fitzgerald, Ketley, Gollop, Jones, Lamont, Neath, & Whitby, 2005). The refreezing stage is similar to the "evaluation" and "adoption" stages in the action research model. Since the action research model is an iterative cyclical process, it places stress on assessment of the effectiveness of the interventions and outcomes of the interventions.

The review of various measurement instruments in examining the learning organization concept have indicated that there is still limited evaluation and measurement in assessing whether an organization has transformed into a learning organization. In addition, longitudinal empirical research has not been conducted on whether an organization maintains being a learning organization or returns to its original state. However, Garvin (1993) has indicated that learning experience curves and "half-life" curves are two methods widely used in measuring learning (Garvin, 1993). Recently, Marsick and Watkins (2003) developed the Dimensions of Learning Organization Questionnaire (DLOQ)© to assess an organization's learning culture on seven dimensions. The DLOQ© represents one of the most widely used assessment instruments for which psychometric properties have been examined extensively and reported. As a result, it can also be a tool for organizations to diagnose their current status to guide change.

Moreover, Cummings and Worley (2005) have also pointed out that organizational leaders need to use supporting mechanisms, such as organizational culture, norms, and structures to reinforce learning and to keep in the new state in the refreezing stage. That is, a planned change toward continuous learning and transformation is accompanied with culture change, which is the most common form of organization transformation. Garvin (1993) has argued that successful learning organizations focus more on the “soft” characteristics, such as insight and culture. Kotter (1995) has indicated that transformational change must become part of the organization’s culture for sustainability. The learning organization’s culture places stress on openness, transformational leadership, and assumption inquiry. Consequently, a learning organization cannot be built immediately because it takes time to cultivate the culture, attitude, management process, and commitment to become a learning organization. Therefore, in the refreezing stage, the support mechanisms in sustaining organization change should be built on “contextual” design, for example, learning and collaboration climate. Therefore, OD professionals should promote a learning culture in the transformation process to sustain the learning organization.

Proposition 3: An organization with a higher-level of learning culture will has a higher-level of sustainability in reinforcing the learning organization state.

Conclusion

The concept of the learning organization has generated considerable attention in recent years in the strategic management, human resource and OD fields. Despite the limited research in exploring the learning organization concept as a large-scale organization transformation process, the researchers have applied Lewin’s 3-stage change model to examine how learning organizations can be achieved and practiced in the real world. In the unfreezing stage, organizational members’ readiness for change and perceptions toward the change project as well as organizational leaders’ perceptions toward the external environment in the preliminary diagnosis are the most critical facilitating factors. In the movement stage, the limited existing learning organization literature has demonstrated that leadership,

empowerment, reward systems, knowledge management, and managing workplace diversity are effective interventions that may be effective in moving an organization towards becoming a learning environment. Finally, developing and facilitating a learning culture is the most effective approach to sustaining the planned change in the refreezing stage. Above all, leaders' actions highly influence the formation of a learning organization, or L-form organization (James, 2003). Leaders' high involvement and willingness to support such a transformational change are necessary. Without leadership support, knowledge management and rewards system cannot be realized as interventions to achieve learning transformation. In sum, leaders and managers have been identified as being critical to a learning organization transformation because of their responsibility for developing the learning infrastructure and creating a culture of continuous learning.

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