

Effective After Action Reviews

This is a method that every coach, leader, manager, mentor, developmentalist or participant in any project should embrace. Note the “*should*” here. While few people in the beginning are able to handle being reviewed or participating in an after action review process, most people in my experience can learn to handle the experience well enough that the process works for them and others.

Essentially, an after action review is just that, review after action.

Sometimes, they can be short check-ins, in other cases they can be formalized, recorded, transcribed and reviewed. When I do executive work, I often like to include one of Chris Argyris’ favorite tools—2 column exercise. Combining both elements in personal and professional development can have a profound effect over time.

One way to employ after action reviews is something we include in our strategy focused developmental coaching system. About every 9 weeks, we bring in a facilitator who is either the Chief Coaching Officer (<http://www.coachingedge.com/ctlc>), or someone the coach respects, who also is respected by the person being coached, as well as their sponsor.

In the actual session, the coach conducts a normal coaching session. The facilitator of the AAR then proceeds with the after action review with the coach, person being coached (“pbc”) and the observer (usually the sponsor). The facilitator asks for comments on effectiveness and lack of effectiveness, as well as suggestions, feedback, corrective measures and expectations. Each person gets the opportunity to comment before the facilitator reviews the coaching with the group.



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Ten Steps for Action Reviews

1. Schedule the AAR ahead of time.
2. Once you enter the session, briefly describe the process.
3. Allow the action to occur in a natural manner.
4. Once the “action” has been completed, the facilitator takes control.
5. Use behavioral events.
6. Make sure everyone gets heard.
7. Review expectations.
8. Ask for learning take-aways.
9. Thank people for participating.
10. Evaluate the process of AAR.

Sample AAR Procedures

Here are some examples of steps you can use to set up an AAR procedure that we’ve used in the past:

1. Schedule the AAR ahead of time and make sure everyone knows that action being taken is being reviewed.

In some cases, people want to prepare to be reviewed. Not everyone can take personal or impersonal feedback. Often you will experience resistance to feedback. Even when the feedback is not necessarily directed as critique, it usually is heard that way, so it is impossible to say, “this is just feedback, don’t take it personally.” Some people will *always* take it personally, no matter what you do, and you need to be aware of this particular drawback of the AAR.

Therefore, providing people the opportunity to prepare is often a step in the right direction. The best thing to do is to establish a regular and consistent system of AAR in your process, so people get in the habit of dealing with regular performance-related feedback.

2. Once you enter the session, briefly describe the process.

Ideally, the facilitator will relate what is going to take place in a step by step fashion, so everyone’s expectations are set in regards to the “roles” each person is playing. A mistake, in my view, is to allow a dominant person to have a dominant role by default. The facilitator must buffer the natural tendencies for some people to control, dominate or direct the session, either directly or indirectly.

You **MUST** manage the power relationships in an AAR or they will cease to be learning experiences where everyone participates. If everyone doesn’t participate then they become veiled training or management sessions. This can produce serious dissatisfaction over time and thwart the learning and review process.

3. Allow the action to occur in as natural manner as possible in the circumstances.

Let’s face it. Every time people think they are being reviewed, they will behave differently than if they are not. That is a given. However, it is still valuable for learning to review the process through after action review systems. Be sure to thank everyone for participating and acknowledge how difficult it is at times to participate in these “fish bowl” types of processes. Yet, discuss how important the process is for learning over time.

4. Once the “action” has been completed, the facilitator takes control.

In some cases, this can be a good thing and a bad thing. In my own case, I have a natural tendency to dominate. Therefore, the session does have a tendency to turn into a training event. In some cases this works; in others, it’s inefficient. For me, it’s often hard to know the difference. Which is why I recommend that you record to audio or video and review the sessions with others—especially identifying the lost opportunities.

In other words, you have an after action review of the AAR. I’ve found this most helpful to my own learning as well as producing continued learning for those who participated. It’s a good idea to formalize this process at the front-end where expectations are set, so people **KNOW** they are being recorded and watched, or may be reviewed. In some cases, you’ll need to have them sign releases for audio and video.

The easiest way for the facilitator to maintain control in the session is to have pre-configured the roles, expectations and time involved. If that has been done, then the facilitator begins with the “actor” and asks what was effective. This allows immediate reflection by the person acting into their actions without the flavoring of the other actors in the situation.

I normally ask something about effectiveness and what they thought they could do to improve. This identifies capacity and opens the door to actionable feedback by those who may provide it—if they are developmentally trained to create actionable feedback by matching the person’s level of capacity. (See Capacity, Capability and Potential in one of my newsletters.)

Once the actor has been offered the chance for reviewing their own actions, I proceed to others who may have been acted upon or a part of the session, giving each a chance to state what was effective—which becomes direct feedback to the actor(s). Once this process is complete, the facilitator provides his or her own review of the process.

5. Use behavioral events.

It is critical to use behavioral events when you provide review of the action. In other words, you say, “X did this in this way, or said this in that way, or performed this action doing Y.” Using verifiable data, often that which can be reviewed visually or in an auditory manner, we can go right back to the actual event itself. This has a lot of bearing on whether people are in sync with the feedback. If you just start your feedback off with, “you did a good job,” it essentially means nothing in terms of actionability because the “conclusion” was delivered by a person without the same “action” system as the person doing the acting.

A simple way to look at this process is to review a paraphrased version of the ladder of inference by Argyris:

Verifiable DATA → Perception of the DATA → Processing of the DATA
using one’s mental models → Creates a conclusion about the DATA.

If you want people to be able to receive learning around actions, you have to clearly specify the cause and effect of your own conclusions. Obviously they won’t draw meaning in the same way as you do, therefore if you want them to see how you draw meaning—which is essential to the learning process—you have to walk them through the system beginning with a behavioral event, your own perception of the event, your categorizing of the event using your own experience and how you draw a different conclusion than they draw.

This process of revealing the meaning made by the reviewer or other actors is what helps fill in the spaces between data and conclusion for the actor. In order to learn how to “act” differently, we have to learn how to view the data or event differently, perceive differently, process differently in order to get to different conclusions. Often this requires a shift in the mental models we hold. Yet, we can’t shift those mental models until we see how they might be different. One of the ways to see that is through after action review with others who can walk us through the event.

6. Make sure everyone gets heard.

Again, a key issue is to get as much participation as possible and to limit as much distraction or inefficiency from entering into the AAR as possible. I’ve already referred to personal dynamics that might enter into the equation.

7. Review expectations.

Make certain the people who are participating are aligned on expectations. Do not let the review end without making certain that people are clear on expectations about what is going to happen next, or what needs to happen next or prior to the next review.

8. Ask for learning take-aways

Before completing the review, ask everyone for their takeaway. Identify again whether capability is being created and potential utilized. If nothing is happening in terms of take-aways or new learning, then perhaps you will need to address those issues with other forms of intervention and leadership.

9. Thank people for participating.

As I've stated, it's not easy to play this game. AAR can be the most profound or profoundly agonizing type of learning that exists. Depending on how people like, get and receive feedback, it can rip your heart out. While learning may take place, if you de-motivate people in the process, you're going backwards, in my opinion.

10. Evaluate the process of AAR

Continuously improve the process around after action review. Note how people respond and learn. Identify from them, opportunities to improve the process, both personally and professionally. Always have the process of AAR reviewed by others in order to get an objective view of the AAR system.

In the End Is the Beginning.

AAR is a profound way to begin working with others in real-time learning systems. People learn when things matter to them, therefore the AAR can be a profound way to get people's attention when nothing else will. The key is to get someone to help you. Find a neutral person or a Strategy Focused Developmental Coach who has been trained in using the system to support an objective view of the AAR system.



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