

# The Hames-Oka Strategic Learning Spiral [*Knowledge Designer*]

Version  
December 1998

Richard Hames & Marvin Oka

---

# THE HAMES-OKA STRATEGIC LEARNING SPIRAL

---

## OVERVIEW

---

The Hames-Oka Strategic Learning Spiral is the principal process tool for strategic conversation, collaborative learning and systems development within the Strategic Navigation methodology. The tool comprises a phased heuristical method of exploration, discovery and critical inquiry leading to informed and insightful action.

A suite of processes designed to facilitate an enhanced ability within any group, organisation, or community, to step into new epistemologies while creating, testing and actioning pertinent new strategies that effect coevolutionary change, the Strategic Learning Spiral method is most effective in situations where:

- a level of uncertainty prevails around a number of critical variables
- there are no obvious solutions to a problem or problems
- patterns and trends, for whatever reasons, are difficult to establish
- previous experience and/or knowledge appears to be of little use
- the degree of complexity appears overwhelming
- emergent issues are creating threatening environmental conditions.

The Strategic Learning Spiral is a versatile tool. While intended primarily as a collaborative “pathfinding” technology to ensure both the *active thinking* and *mindful action* of groups of people engaged in systemic development – especially where such development requires extensive ‘strategic conversation’ around complex, uncertain and unpredictable issues and dilemmas - it can even be employed by individuals as a more immediate, personal ‘aide memoir’ (or checklist) for unfettered thinking.

As a *content neutral* method of collaborative learning, the Strategic Learning Spiral can be effective even when practiced by diverse groups with limited knowledge and ability, as when it is used in a systematic and professional manner by experienced teams.

It can be used to resolve complex systemic problems, expand community knowledge and understanding, undertake the development and enactment of new strategies or policy, and inject *confidence for action* into the process of strategic navigation – any situation, in fact, where complex problems are demanding our attention and where responsiveness, adaptiveness and sustainability are the overriding concerns.

## FRAMEWORK

---

The Strategic Learning Spiral is not a prescriptive method, although it does attempt to overlay a coherent, (or *systematic*) procedure on what we believe should be a predominantly *systemic* process of inquiry and activity.

Combining rigorous analysis with intuitive synthesis, and integrating both strategic and operational intelligence from the whole system of which the participants are a part, the Strategic Learning Spiral has been designed to enable those engaged in the resolution of complex issues (from individuals through to work teams and whole communities) to pattern their thinking in ways that liberates the inherent wisdom within the group.

Thus, use of the Strategic Learning Spiral will facilitate:

- an expanded appreciation of the broader systemic context in which any set of critical issues is located
- clearer, more focused perspectives on these issues
- greater levels of consciousness concerning the scope, dynamics and interconnectedness of any critical issues affecting participants and their constituency
- the continuous use of ‘wideband’ intelligence to help shed light on the complexity surrounding such critical issues
- critical inquiry to enable the injection of novelty into the thinking
- the mindful integration of systemic reflection into participant’s thinking prior to the taking of informed action.

Especially useful for an organization’s Strategic Navigators and Decision Theatre personnel in the facilitation of arrested states, fixed views of reality, and the short-term nature of many strategic decisions (when pressing timeframes and systemic dilemmas can impact negatively upon long-term viability) practiced use of the Strategic Learning Spiral enables us to:

- (a) avoid spending precious time solving the wrong problems precisely, and
- (b) surface the most workable resolutions to the issues that really matter.

---

## LEARNING SPIRAL STRUCTURE

---

Although the starting point for the Strategic Learning Spiral method was David Kolb's Cycle of Learning, the heuristical approach used within the Hames-Oka method acknowledges and adopts a fundamentally more systemic and exploratory approach to learning.

Essentially, the Strategic Learning Spiral comprises eight phases with four transition systems. The eight phases are arranged in four linked pairs (or dyads), each dyad representing one type of learning domain.

Although each discrete phase has its own processes and associated tools and techniques, systems arrows denote a fluidity wherein each phase can simultaneously point forwards (in *development*) and backwards in time (in *appraising* and *reviewing*).

At another, deeper level, the four linked dyads represent the dynamic interdependence of theory and practice. And in addressing both of these as a continuous thread through the spiral, we develop the third aspect of learning, which is learning to *become* different. In this way, the Strategic Learning Spiral process facilitates the fundamental pattern and criteria of any complex adaptive (learning) system; namely, that it:

- Acquires information about its environment
- Acquires information about its own interaction with that environment
- Identifies regularities in that information
- Condenses those regularities into a model
- Acts in the real world on the basis of that model
- Qualifies competing models based on real world results
- Upgrades its models based on real world results

The most subtle, and arguably significant aspect of the model lies in its eighth phase which, in fact, is the precursor to moving through the next round of the spiral at a higher order of awareness. This *Coevolving* phase entails being responsive to the effects of your actions. The information that comes from these transactions are fed into and processed by strategic intelligence systems. These systems then feed that strategic intelligence into the *Contextualising* phase, thereby moving us into an iteration of the learning process at different learning planes where we are able to focus on:

- (a) the process of learning, and
- (b) the nature of knowledge itself.

In 'spiraling' onto different learning planes, we are able to:

- change what we do
- improve our understanding of how we are doing it
- reflect systemically and strategically on higher-level issues so as to continuously question the value and purpose of what we are doing while

simultaneously improving our understanding of it's complexity

- reflect on the quality of our own thinking, and expand our own paradigms and worldview.

Thus, the eight phases in this iterative method enable us to focus on a particular aspect of any complex issue, or sets of issues within a defined larger systemic context, where this is recognized as being based on our paradigms and worldviews at that time.

---

## THE FOUR TRANSITION SYSTEMS

---

Each learning domain has a product (or outputs) that acts much like a propulsion agent as it inputs into the next phase. We call these four sets of combined inputs and outputs “transition systems”. These transition systems either provoke the collection and integration of useful information from a variety of sources into the ongoing process of knowledge creation or, as in the case of *resourcing*, replenish our capacity for actioning change.

The first of these, *strategic intelligence*, enables us to more accurately assess the scale, urgency and significance of the systemic dynamics with which we are having to deal. It allows us to comprehend the scale of our predicament.

The second, *researching*, encourages us to explore certain issues in greater depth where required, or to uncover what we do not know. Researching also broadens our perspectives. It confirms or challenges our assumptions and directionalises us - showing us where we ought to be looking, and supplying us with more thorough information concerning the various dimensions of our business context.

As we begin to develop our ideas, the third, *operational intelligence*, ensures that we take adequate note of the more practical aspects of what is (or is not) possible, feeding us information about what we don't know that could make a significant difference to our ability to (re)focus.

Finally, *resourcing* encourages us to ensure that adequate time, skills, money, facilities, people, tools and equipment - and particularly relevant information - are readily available to those people who will be responsible for implementing our strategy.

# SUMMARY

Drawing upon all the systems that comprise a Strategic Navigation System, the Hames-Oka Strategic Learning Spiral articulates a sequence of dyads representing the continuous balance required through ‘breathing out’ (providing energy for action) and ‘breathing in’ (providing space for reflection) without which learning remains ineffective.

Thus, the learning heuristic depicts the energy for learning and confidence for taking action required from the organization’s leaders in order for the organization to remain viable over time. Experienced as a continuous braiding of thinking and acting, and navigating the waters between the past and the future, it creates a propensity for collaborative learning that creates the momentum for change.

Using this simple eight-step sequence allows us to learn how to respond to situations with far greater conviction. It also encourages us to integrate new knowledge into our capability for cognitive design. This is the level of applied learning. And applied learning allows us to act and improve our actions.

But use of the strategic learning spiral can do a lot more than just that. Employing the *Coevolving* phase as a reflective bridge into an altogether ‘higher’ level of learning enables us to use the entire sequence once more. This time around, however, it can be used not only to learn new actions, but to learn about how we are learning to think about and ‘do’ new actions. In this case, we can use the spiral to reflect on the very processes we’ve used to develop the responses we’ve come up with in order to address the situation at hand. This level of ‘meta learning’ is the level of patterning.

Finally, additional insights can be found by using the same *Coevolving* phase from the level of patterning as a reflective bridge into an even higher level of learning (that of learning about the nature and structure of ‘knowing’ itself). Here, the eight step learning sequence can be used to critically examine our fundamental worldviews. This level of learning is precisely the level we shall need to access in order to reorganize our core epistemologies, guiding principles, morals, ethics and aesthetics.

To become so mindful is to achieve *unconscious competence*. The real value of the Strategic Learning Heuristic, therefore, resides in this intrinsic development of consciousness through processes of mapping and strategic conversation.

To engage in strategic conversation is to engage in collaborative learning, which is after all, the essence of the Strategic Learning Spiral. The Strategic Learning Spiral integrates multiple perspectives into our thinking; generates dialogue; and effectively maps the changing dynamics of our systems, allowing us to make more informed and insightful decisions for change. It is the continuous building of intelligence and learning from which planning and strategic navigation emerges.