

Learning from experience

Why history matters in organisational life

Alison Donaldson



In organisational life today, little attention is paid to history – how things have come to be as they are. Yet reflecting on what has happened can be a good way of learning from experience, tracing the effects of a particular investment and/or acknowledging the contribution people have made. To these ends, the author and her colleagues have, over the past decade, been developing narrative writing methods that are particularly informed by thinking around emergence and the role of writing in society. Seeking to understand how things have come to be as they are is arguably a conscious act in itself. It can also be seen as a counterweight to dominant managerial practices – mostly future-focused – in both public and private sectors

Keywords

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Prologue

Go into any organisation today and ask to see something in writing about a programme of work, a team, a department, or even the whole organisation. What do people show you? Dry documents, most likely, such as plans, strategies, policies, proposals, guidelines or “terms of reference”. In my experience it is rare to come across any kind of readable account about how things came to be the way they are. It almost seems as though we live entirely in the present, ignoring the processes that got us here.

For the past decade, I have been writing narrative accounts to describe and evaluate organisational activities that have evolved over time and are hard to measure. The organisation that has given me the opportunity to develop such writing methods is UK charity Macmillan Cancer Support. Often, people who read one of the accounts say it was a relief to learn about how a group or work programme came into being. They understand better what the instigators had in mind, how the shape of things changed along the way, and what can be learnt from the experience. My work has been referred to variously as “capturing the story”, “making the invisible visible”, “narrative tracking”, or even “evaluation for learning”.

It has become clear that, by shedding light on what happened over time, a narrative account makes it possible to trace what has come from an investment that the funding organisation has made. Macmillan’s Chief Medical Officer, Jane Maher, has referred to this as “traceability”. A written account can also serve to acknowledge the effort people (individuals and groups) have put into making a difference in their field.

The conscious business connection

What does all this have to do with “conscious business”? My experience is that narrative accounts can not only contribute to organisational learning, but can also further understanding of organisational change as it really happens. In doing so, they challenge the fiction that top-down strategies, policies and bureaucratic controls are the best or only way to bring about large-scale improvement.

In my view, seeking to understand how change really happens, and who has contributed what, is in itself a “conscious act”. However, there is more to it than that. A narrative approach can offer a counterweight to the managerial thinking and practices that are so widespread today yet remain strangely unchallenged:

“Managerialism has now become so rampant... that it fills the days and nights of practitioners and managers alike in organizations around the world, with its unending requirements for measurement, assessment, evaluation, report-writing and presentation. Yet its invasion has been so drawn-out, and its approach so stealthy, that we have scarcely noticed how profoundly it has altered the organizational landscape.”

Taptiklis 2008, p. 4

Particularly relevant for my purposes, Taptiklis goes on to urge people to focus on the reality of the world as it is rather than on the idealised, simplified depictions offered in most reports and presentations.

Personally, I am convinced that a more realist, narrative approach could be helpful in both public and private sectors. In public services like education and healthcare, most people agree that target-setting and “paperwork” (now largely computerised) have become extremely demoralising for many professionals. Meanwhile in business, enormous resources go into planning and proposal writing, which often ignore history and focus on the future, thus missing the wider picture.

Developing a practice of narrative writing in an organisation

The narrative approach I describe has been developed over the past decade with my colleagues Jane Maher and Elizabeth Lank. It was in 2003 that a conversation began between the three of us about how Macmillan Cancer Support might go about describing and evaluating its relatively unpublicised work with doctors. In essence, what needed investigating was whether, by enabling general practitioners to develop a collective voice, the organisation had helped to improve the quality of support given to cancer patients and their families across the UK.

Over about three years, some 30 narrative accounts emerged, telling the story of this work. This was not a PR exercise – we took care to include controversies and “dead ends” as well as achievements and lessons learnt. We then used these (mostly internal) narratives as our main source when publishing our book, *Communities of Influence: improving healthcare through conversations and connections* (Donaldson, Lank and Maher 2011). (For some related articles, see also, the book’s web site: <http://www.communities-of-influence.co.uk>)

Since then, Macmillan's senior management has started to highlight communities of influence as one of the organisation's main ways of working to improve the care offered to people affected by cancer. In 2012, Chief Executive Ciarán Devane stated: "In the absence of 'political' authority, we deliberately work with others to establish communities of influence" (Devane 2012). Charities in the health sector often have little or no direct control over people in the NHS, but with its focus on long-term relationships and "communities of influence" Macmillan has developed an innovative way of improving patient care.

The example below may help to show how this works. Although it involves health professionals in the NHS, it is almost certainly relevant to business. In one sense a charity like Macmillan – which seeks to influence the care provided by the NHS as well as providing its own services to patients – is no different from a business: it cannot make professionals act upon its recommendations, nor can it compel people to use its services. But it can extend its reach and influence by creating and working with communities of health professionals or people affected by cancer. This is not unlike a business using social media and stories about its products and services to reach out to customers.

An example: tracking a group of health professionals

In 2009, a new community of influence was formed with joint funding from Macmillan and the Department of Health, and I was asked to do the narrative tracking. The group, which is still going strong today, has 12 members – 11 of whom are research-active senior nurses and one a physiotherapist. It is known as the Consequences of Cancer and its Treatment collaborative group (CCaT). I won't give much more information about CCaT itself, as it is not my main subject here. (See www.cancerconsequences.org/our-aim.html). Suffice to say that the group articulates its aim on the web as follows: "CCaT is a collective voice influencing healthcare policy, practice and research to improve the experience and outcomes of people affected by cancer and its treatment"

As narrative writer, I was part of the Macmillan team supporting the group, and I joined every group meeting and kept in touch with members in between, mainly by email and phone. Looking back over my journey with this group, it strikes me now that I did not simply write a chronological account of its development. In fact, I produced various types of writing – for example: a detailed description of the group's early life; some brief accounts of the influencing activities of its members; a comprehensive log of achievements (e.g. useful research, presence in influential bodies, identification of the skills needed by health professionals supporting people after cancer treatment); and some tips for others who want to form a community of influence in their own field. Sometimes I stretched my role as narrative writer and edited some of the group's publications.

To give a flavour of what happened in the group's first four years, I will point to some significant phases or moments. In the early stages, we (the support team) attempted to help the members develop into a community with an agreed sense of purpose. We did this largely through face-to-face overnight meetings, which many members later recalled as uncomfortably unstructured yet important none the less.

At these gatherings, we encouraged people to share experiences of influencing and collaboration. Sometimes I used the stories I had collected to stimulate thinking. Below is an example of a small story I read out on one occasion. The group member, Gillian, a Nurse Consultant in a Scottish Cancer Centre, had maintained regular informal contact with her medical colleagues (hospital consultants) over time and thus succeeded in persuading them to share their patient follow-up clinics with her:

Persuading consultants to share follow-up

Gillian keeps chipping away, having conversations with colleagues on an everyday basis. For example, the two colorectal consultants who treat anal cancer knew her from earlier, so she spoke to them about consequences of treatment and eventually all agreed to share follow-up, starting in early 2010. This is important, because normally the consultants are mainly focused on detecting recurrence of the cancer, and if an anal cancer patient gets a recurrence the situation is often still 'salvageable'. Gillian commented: 'It's small step changes like this, not going in like a bull in a china shop. We respect each other's skills.'

As this small narrative made clear, this was a significant step, allowing Gillian to focus on any unmet needs patients might have after their treatment. Following the community meeting where I read out this story, more than one group member said that it had revealed a lot about the nature of influence and why it was important to capture it in writing.

Further turning points came in year two, when the group took charge of its own meeting agendas and started work on what proved to be a crucial joint product, subsequently published as a Macmillan patient booklet called "What to do after cancer treatment ends: 10 Top Tips". Working on this collective task proved to be a galvanising experience and the group came to see the booklet as much more than a patient leaflet. For them it became an important working tool in their effort to improve care for people after treatment.



(See <http://be.macmillan.org.uk/be/p-20338-what-to-do-after-cancer-treatment-ends-10-top-tips.aspx>).

At this point, it feels important to shine a little light on some of the principles that inform the narrative writing. First, I recognise that there is never just one history of a group. Writing about what has happened and what people have learnt from the experience is a highly selective process. It is up to the author to write something that is interesting, based on what people have told her, and which might stimulate learning and be useful to those it is addressed to.

Additionally, if it is to stimulate learning, the narrative account itself needs a *social life*. In other words, it has to be shared, read and discussed in order to influence thinking and practice. This insight came to me some years ago when I noticed the tendency for reports to end up unread and unloved, gathering dust on shelves. As a writer, I have since learnt to insist on face-to-face meetings as an opportunity to discuss drafts and draw out new insights. Indeed, I have come to think it is largely the writer's responsibility to make sure this happens.

How have we come to neglect history?

No doubt there are many ways of understanding how people have come to neglect history. Perhaps two world wars have something to do with it – leaving people eager to look ahead to a more positive future. But I feel inclined to go further back in time.

Subtle influences of writing and printing

In the beginning, when humans had language but no writing, it appears that they told each other stories to pass on experiences and knowledge. Then, two developments changed society for ever: first, about five thousand years ago, alphabetic writing was invented in the Middle East and was soon taken up by the Ancient Greeks; printing then followed (in Europe) in the 15th century.

Many scholars have shown that these two technologies – writing and printing – have exerted subtle but far-reaching influences on us all (Ong 2002; Havelock 1986; McLuhan 1964; Innis 1951). In other words, while writing and printing were essential ingredients in the development of modern society, they also introduced certain biases into the ways in which humans relate to one another.



The printer's device of William Caxton

When I look at organisational life today, it seems to me that these same technologies have fostered abstract, conceptual thinking, categorisation, over-structured meetings, uninspiring presentations and written guidelines (Donaldson 2005). History and stories have been largely squeezed out of the reports, plans and proposals produced daily in modern organisations.

Dominating influences of science and technology

Writing and printing were also prerequisites for another major development in human society – science – which has further contributed to the eclipsing of stories and history. With all its advantages, scientific thinking has become so dominant in many areas of life that we are often oblivious to its influences. It has instilled in many people a blind faith in objective evidence, measurement, statistics and rational decision-making. In contrast, stories and anecdotes have come to be seen as unreliable and best limited to the realms of childhood, literature or entertainment.

A related development that has brought obvious advantages but has come to dominate many areas of modern life is technology. Computer technology, in particular, has allowed bureaucratic ways of working to spread rapidly in recent years. As Neil Postman pointed out more than 20 years ago in his book *Technopoly*, bureaucratic techniques (e.g. the use of standardised forms and categories) are employed almost

unquestioningly – without looking at context or history – to situations that “cannot be solved by technical means and where efficiency is usually irrelevant, such as in education, law, family life, and problems of personal maladjustment” (Postman 1992, p. 88).

Indeed, in my view, the misplaced use of scientific thinking in organisational life, and the associated neglect of history, is helping to perpetuate the view that human problems can be solved with technical means, that organisational change is susceptible to planning and rational design, and that quantification is the best way of evaluating activities and incentivising human beings.

Interestingly, Postman ended *Technopoly* by recommending that every academic subject (including scientific ones) be taught as history. That way, he argued, people might begin to understand that “knowledge is not a fixed thing but a stage in human development, with a past and a future”. History teaches that the world is not created anew each day and everyone stands on someone else’s shoulders. Looking back on my own schooling, I wish we had learned about the history of science, religion and other subjects, rather than being presented with a tedious catalogue of monarchs, dates and battles.

Process thinking and emergence

To address this neglected historical perspective, how might we think about, or write about, how things have come to be the way they are in the organisations we work in? In my view it is indispensable to understand “process thinking” and “emergence”. I will try to provide a simple and succinct explanation of these two concepts here.

Process thinking: there are many physical objects in our world, but many of the “things” we deal with in organisational life, including organisations themselves, but also strategies, culture, systems and procedures, are best understood as processes (Elias 2000; Whitehead 1929). This is more radical than it may sound, because we are so used to referring to processes as things. To give just one example, we talk about “knowledge” as if it were something you could pick up or put down, when what actually happens is learning, recalling, thinking, writing, reading, publishing, connecting, discussing, reflecting and comparing – all dynamic, largely interactive processes. Process thinking is also a prerequisite for understanding emergence, as we shall see next.

Emergence: how does anything develop or change in organisational life? A simple way of putting it is to say that organisational change (and sometimes stagnation) emerges predominantly through specific human interactions over time (Stacey 2005). Below are my suggestions about some of the main aspects of emergent thinking:

- Emergence is at work all the time – it is not a choice. Some people imagine we have the freedom to choose: either we apply command-and-control or, at the opposite extreme, just let things emerge or go with the flow. This is mistaken. Even a leader telling people what to do is subject to emergence. Nevertheless, some individuals are more influential than others – which is another way of saying that power is ever-present. Indeed, change sometimes depends on someone challenging authority.
- Change is a complex, uncertain process. This has a number of implications: no single person can control or accurately predict what happens; emergence is paradoxical, in that change and repetition (e.g. in the form of habits, “stuckness”, and even culture) can occur at the same time; and change is

non-linear, which means, for example, that influence is typically mutual rather than one-way, and that a small beginning can unpredictably turn into major change.

- Humans are through and through social beings (Burkitt 1991, 1999), and organisational life consists essentially of people relating and responding to one another in conversation and writing (Shaw 2002, Stacey 2005).
- Human beings are constantly engaged in “sensemaking”. We are always making sense of what happens by developing stories, including rational explanations, and we often come to believe our own stories to be “true”. Indeed, much of what goes on in organisational life can be seen as people negotiating over which stories and interpretations assert themselves (Wenger 1998; Weick 1990).

Reflecting emergence in writing about organisational life

“In order to see more clearly, here as in countless similar cases, we must focus on the details of what goes on; must look at them from close to”

Ludwig Wittgenstein, *Philosophical Investigations*, 1953

It makes sense, in my view, for anyone attempting to think or write about organisational life to reflect process thinking and emergence in their language as much as possible. People may experience these phenomena daily in practice, but I suspect few think consciously about them. We are so used to swimming in a sea of abstract concepts like “system”, “strategy”, “implementation”, “leadership” and “performance” that we hardly notice them, or we just accept them as convenient short-hand. For me, it has been an interesting journey exploring how to reflect emergence in my writing. Below I will offer a few thoughts on what has worked.

Before I do that, however, it is worth mentioning that my argument about the importance of history is not just addressed to writers. Anybody working in an organisation can create opportunities for people to reflect on experiences together – whether during routine meetings, or on occasions specially set up for this purpose, such as debriefs, reviews or “post-mortems”. When we take time to make sense of the past, or for that matter the present, we are often able to see a new way forward. One colleague described this as “using the rear mirror to drive forwards”. Historiographer E H Carr used a wonderful metaphor to convey the historian’s relationship with the future:

“Good historians, I suspect, whether they think about it or not, have the future in their bones. Besides the question ‘Why?’ the historian also asks the question ‘Whither?’.”

Carr 1961, p. 108

In my own experience, when thinking or writing about organisational life, above all it pays to take extra care in how we use language. One feature of modern language already alluded to is the widespread habit of reifying or “thingifying” processes. For example, when people talk or write about “organisational structure”, we might think this is just convenient short-hand. But we cannot touch an organisation’s structure (which isn’t usually buildings, by the way), so the term is in fact metaphorical. Even if someone can produce a diagram, in practice structure is experienced on a specific level, such as “the chief executive has never set foot in our department”, or “the people in marketing are not talking to their colleagues in production”. As far as possible, therefore, I try to use words that bring out the movement and flow of life – often verbs are better than nouns.

Furthermore, once one accepts that change emerges from specific interactions, it follows that *detail sometimes matters*. For the writer, this may mean pointing to a specific conversation that changed minds, or to an initiative (individual or collaborative) that made a difference. Another way of capturing detail more accurately is to use people's own words wherever possible, recognising that the story is theirs even though the author is the one responsible for the writing.

One way of doing this is to audio-record and transcribe what people say, but this is very time-consuming and not always helpful. Often, I simply try to note in handwriting as many of the words spoken as possible, and then resist the temptation to change or paraphrase them in the narrative account. I recognise that I am responsible for the text, but I always hope that, by incorporating people's own words, a narrative is more likely to "resonate" with those written about. One member of the group of health professionals mentioned earlier emailed me a comment on a narrative account I had circulated, saying that it resonated with her as a participant and this was likely to mean it had "veracity".

Another method that has proved useful is to put together *multi-perspective narratives*, which make it possible to reflect people's diverse interpretations of events. There is then no need to reach a unified account – each person can speak or judge for themselves.

Finally, I always make a point of giving people opportunities to review what has been written about them, so that I can work their comments and suggestions into the next iteration. As well as giving them a chance to suggest revisions and correct errors, this is another way of bringing multiple voices into the story. When referring to this practice of inviting comments from those written about, again I often use the phrase mentioned earlier, "the social life of documents". Or, in the words of social anthropologist Tim Ingold:

"...any study of human beings must also be a study with them."

Ingold 2011, p. 239

Conscious business revisited

As we near the end of this story, what further connections have emerged between history, narrative writing and "conscious business"? First, it seems to me that part of thinking consciously about organisational life means being mindful of history. What I am advocating is that people working in organisations pay more attention to how things have come to be as they are. This may in turn give them the courage to question taken-for-granted ways of thinking about leadership, change and influence. By reflecting on actual experience, I hope people will come to see that what makes the world go round is not just control, structures, plans and measurement, though they have a part to play, but also relationships, conversations and stories.

It has been suggested to me that perhaps those managing organisations actually want to be history-less; in the pursuit of efficiency and control, understanding what happened in the past may not seem useful or relevant. What counts, according to this worldview, are things like structure, clear objectives and planning – the rational, forward-looking disciplines. What's more, delving into history may seem a risky business, as it inevitably raises uncomfortable questions about who was responsible for mistakes and failures. It is a credit to Macmillan Cancer Support that it has the sense and courage to use writing to look back and to learn from its experience.

Today, many people at work are burdened with excessive paperwork and computerised procedures. And they may be surrounded by idealised depictions of the organisation they work in. Perhaps, in some situations, a more intelligent use of writing would be to adopt a more historical approach, by which I mean capturing and reflecting on how the present state of affairs has emerged. There is no guarantee that this will make things better, but I think it stands a good chance of raising awareness and challenging conventional wisdom about how organisational life really works.

One golden thread that has run through my story here is the social, interdependent nature of human beings. By bringing narrative and history back into the workplace, we are recognising that it is human relating and relationships that make a difference in organisational and business life.

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