National Storytelling Network's Storytelling In Organizations SIG presents the first in a series of white papers:

Transforming Capabilities: Using Story for Knowledge Discovery & Community Development

By Elizabeth A. Doty

Most leaders know when they need to mobilize their organizations around a new set of competencies or a new value proposition. They recognize the potential to deliver higher value-added products or services, but sometimes struggle to activate these new practices throughout their organizations.

The paradox is that often the knowledge is already there. It is either hidden in isolated pockets of innovation, or inaccessible because people do not know what they know, do not know it is valuable, or cannot describe it effectively. And this inaccessibility can hamstring the most promising new strategy, even if it is based on a seemingly obvious extension of current practices.

One solution, then, is to help people surface, translate, and apply the latent knowledge hidden in the organization. And, as it turns out, the most effective methods for tapping this hidden asset also restore confidence, re-engage commitment, and re-build trust.

But first, what are the barriers to extending and activating new capabilities? Why is diffusion not automatic, especially given the significant potential benefits?

Barriers to Knowledge Transfer and Learning

According to a landmark 1994 study by Dr. Gabriel Szulanski with the members of the American Productivity and Quality Center (AQPC), it takes an average of *27 months* for in-house best practices to migrate throughout an organization.[1] In particular, Dr. Szulanski identified four key barriers to transfer of knowledge, know-how, and best practices, as shown in Table 1 below:

Table 1 - Barriers to the Transfer of Knowledge and Best Practices

1. **Ignorance:** People do not know what they know, or that others might find it useful. Conversely, people do not know that others have knowledge they might need.
2. **Lack of absorptive capacity:** People lack the money, time, or other resources to pursue new knowledge and put it to use.
3. **Lack of pre-existing relationships:** People do not have the personal ties that make it attractive to invest time in teaching or learning.
4. **Lack of motivation:** People are unclear about how the benefits of new knowledge or practices outweigh the investment to learn it.

The last barrier, "lack of motivation" is particularly relevant to our focus on transforming capabilities. This is not just a question of demonstrating business value; motivation can be affected by erosion of trust or commitment, uncertainty about the future, loss of identity or status, and stress or overwork. All of these reactions are typically activated by change, which is why they are sometimes addressed separately as change management issues. But when the change has to do with developing new capabilities, "managing change" is not a separate process, but an integral part of the change itself—adding even more complexity to the leader's task.

So, what works? How do we bootstrap new competencies organization-wide from a few isolated pockets of innovation? Is it possible to re-engage true commitment and rebuild trust in organizations where change after change after change has created a sense of learned helplessness? How do we re-activate forgotten knowledge or skills, and transfer subtle tacit know-how?

Story as Part of the Solution

Answers to these questions and new options for leaders are emerging among several different disciplines, and it turns out that **stories** and **storytelling** are an important part of the solution.

Gradually, leaders are starting to make widespread use of stories for enlisting the commitment that enables change. There is growing recognition of the power of stories for sparking imagination, conveying values, and inspiring collaborative action, thanks to the work of Noel Tichy,[2] Stephen Denning[3] and others. And trainers have learned from leading thinkers such as Roger Schank[4] how to make learning come alive through the introduction of stories and links to participants' own experience.

Now there is an emerging third option that is even more directly tied to developing skills in the work setting: the option of using story to surface and share knowledge, while simultaneously building the informal community relationships that extend, diffuse, and apply it. Among the pioneers in the use of narrative for knowledge management are Seth Kahan,[5] Dave Snowden[6] and the research team at IBM.[7]

What first made me aware of this potential was an account by John Seely Brown and Paul Duguid that rang true to my own experience as a line manager. In their 1991 analysis of the day-to-day practices that enable Xerox technicians to resolve customer problems on the job, Brown and Duguid highlight the use of storytelling procedures as a central vehicle for forming a coherent diagnosis of a defective machine. Here is a brief example:

On one service call (Orr 1990b, 1987b) a rep confronted a machine that produced copious raw information in the form of error codes and obligingly crashed when tested. But the error codes and the nature of the crashes did not tally. Such a case immediately fell outside the directive training and documentation provided by the organization, which tie errors to error codes. Unfortunately, the problem also fell outside the rep's accumulated, improvised experience. He summoned his technical specialist [who was] equally baffled. One option was to abandon repair altogether and to replace the malfunctioning machine. But both the rep and the specialist realized that the resulting loss of face for the company, loss of the customer's faith in the reps, loss of their own credit within their organization, and loss of money to the corporation made this their last resort.

Solving the problem in situ required constructing a coherent account of the malfunction out of the incoherence of the data and documentation. To do this, the rep and the specialist embarked on a long story-telling procedure. The machine, with its erratic behavior, mixed with information from the user and memories from the technicians, provided essential ingredients that the two aimed to account for in a composite story.

Story telling allow[ed] them to keep track of the sequences of behavior and of their theories, and thereby to work towards a coherent account of the current state of the machine. The story-telling process continued throughout the morning, over lunch, and back in front of the machine, throughout the afternoon, forming a long but purposeful progression from incoherence to coherence. Ultimately, these stories generated sufficient interplay among memories, tests, the machine's responses, and the ensuing insights to lead to diagnosis and repair.

> Rep and specialist were now in a position to modify previous stories and build a more insightful one. They both increased their own understanding and added to their community's collective knowledge. A story, once in the possession of the community, can then be used—and further modified—in similar diagnostic sessions.[8]

This example demonstrates the value of storytelling for sharing substantive know-how, diagnosing complex problems and jointly inventing new solutions, in addition to its more widely accepted applications for conveying values or inspiring change. It points to the power of individuals to take charge of their own learning, to use their collective experience as a resource, and to transfer that learning through informal communities.

Story for Knowledge Discovery

What if we could harness this power more systematically and intentionally? What would it look like? Well, I got a glimpse one day when a delegation from a police force in Southeast Asia came to visit me during a study mission to the U.S., on the recommendation of a friend of mine who worked at Hewlett Packard. I learned that they had invested a good amount of work in developing a vision as the focus for transforming their culture. For some time they had been perceived as an occasionally repressive force, and their vision was to be seen and act as a force for community. But, at this point, they were not quite clear how to move to implementation of this new vision.

During this visit my friend wanted me to tell them about some of the story-sharing work I had been doing for individuals exploring meaning and work. But, I thought to myself, these are police officers, detectives, captains, and government officials from a country whose culture I know very little about. How am I going to describe this to them? I decided to take a chance. I asked them if they would like to try it for themselves—and they agreed. In light of their vision, we chose to focus on Police in the Community as our topic—sharing our experiences as officers, citizens, friends and family members of others interacting with the police.

Once the topic was chosen, they started to think, reflecting, calling up memories. Then there was this long awkward silence, as people glanced around the room at each other, a little nervously. A few seconds later the leader of the task force started to speak–and, using the objects I had put in the center of the table as props, he told the story of the department—where it had come from, how it was perceived, and what he thought it could be. When he finished, there was a small "sculpture" in the center of the table, a visual depiction of their vision.

Now the others relaxed and started, one after another, to share experiences. They shared about heroic efforts to prevent a crime, to solve a crime—and the stress of leaving a crime unsolved. They talked about the humiliation of family members when they had been mistreated by the police. They even talked about people that they knew had been framed. And eventually, after about 45 minutes, everyone had shared but one man who was sitting at the end of the conference table, hunched over, and very quiet. I reminded him, "You know, it's your choice whether to speak or not…. and there's no harm done if you don't." And he said, "No, I have something I want to say."

He went on to tell of a time not too long ago, when he had heard about a weapon being purchased by a young man, a weapon which is illegal in their country, a cleaver. Now technically, he should have arrested this young man. But because he had been recently been assigned to patrol a single city block and had become familiar with that community, he happened to know the young man and some difficulties he was facing. He thought maybe if he talked to the young man's family about these problems, he could avert a crime and not have to arrest him. He really struggled with this, because it meant breaking the rules, if not the law. In the end, he did talk to the family and thankfully, no crime was ever committed. He ended by saying that, to this day, he still worried about breaking the rules that way.

With just 15 minutes left now in the session, the group fell into a rich, engaged conversation—much of it influenced by the last man's story. What they recognized together was that it is the judgment calls that officers have to make in the field that really determine how they live up to their vision as a department. And that, in fact, building relationships with people in the community could make their lives more complex—requiring new skills and decision-making practices. As they wrapped up the meeting, it was clear that they did know where to start on implementing their vision—and it had to do with supporting officers in the field in managing these new relationships.

Then they got up, and they left. I had no idea what would come of this story-sharing experiment. But on their way back across the country from a tour at Harley Davidson, they stopped and visited my friend at Hewlett Packard again. And they told her that of all the presentations, all the factory tours, all the conferences, and all the meetings they had attended, the experience that stayed with them the most, that they talked about the most, that they remembered the most, was this hour and 40 minutes of sharing experiences with each other. And, in the months that followed, I heard second-hand about the department's ongoing initiatives both to involve their citizens and to support officers in building skills and sharing expertise, visibly demonstrating their ability to be a force for community.

As I looked back on this meeting, I realized that something powerful was at work here. Before that session, they did not know what they knew. Yet, with no new resources other than their own individual experiences, the group had arrived at a shared understanding of what to do next. It seemed that we had accidentally demonstrated the use of story for knowledge discovery—a way for groups to intentionally tap their own past experience for relevant, actionable ideas. Why did it work?

Why It Works

First of all, it addressed the first barrier we mentioned above—ignorance of our own or others' knowledge. Because learning from experience is not automatic, they needed an occasion to work through the implications and meaning of past events, so they could surface and consolidate new working models to guide future action on their vision. And focusing the inquiry on a specific, immediate challenge helped to access and reactivate the most relevant knowledge—in contrast to broad, general requests to share expertise, which often leave us blank. And finally, the stories themselves implied not only explicit, codifiable principles, but also carried tacit knowledge—the context, background, judgment, and intuitions that enable us to put principles into action effectively. For example, in this case, the principle of addressing officers' relationships with the community could potentially become a trite and meaningless exhortation, if it did not also address the subtle tradeoffs, moral dilemmas, and legal questions embedded in the story about the officer's decision about whether to make an arrest. As John Seely Brown has said, "At the root of the problem lie issues of meaning, judgment, sense making, context and interpretation—issues far beyond a simple search [for codified knowledge] and embedded in a social life."[9]

But there was a second benefit from the session. In addition to surfacing and consolidating what they knew, their stories and the discussion that followed led to a clear and focused priority for learning. They needed to learn how to support officers in the field as they managed new relationships with the community. In practice, such a clearly identified learning edge operates like a magnet for new solutions, best practices, and helpful resources. It represents the "teachable moment" that every instructor strives for. But we cannot get there until we have worked through what we want to do and what we need to know to do it. In fact, as a mentor of mine once said, "You can't learn something until you almost already know it."[10] Then, once we are solving the right problem, we don't seem to really notice the process of searching for and applying practices and tools from other sources.

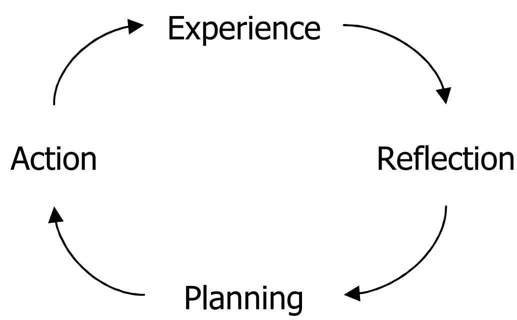
For example, on one project at a management consulting firm I worked with, we spent weeks and months trying to understand what led to the severe claims that accounted for 1% of claims volume but 85% of losses for an insurance client. When we finally discovered that it was a combination of social barriers to sharing expertise along with arbitrary criteria for escalating complex claims, it took us only days to develop the basics of a solution (at least to the escalation issue; the social barriers took more work to address). I remember sitting in a meeting with several claims experts, listing early-warning indicators that could be used to identify potentially severe claims, when a software programmer casually mentioned that he had found an inexpensive, off-the-shelf tool for applying rules to flag items in large databases. It was just the solution we needed—and he had found it during his lunch hour, simply by describing our challenge to a friend who had faced a similar problem.

This ability to focus learning, then, points to an antidote for the second barrier to knowledge transfer: absorptive capacity. While there <u>are</u> real resource constraints to applying new knowledge and adopting new practices, much of the problem has to do with simple overload. As O'Dell and Jackson describe it, "When the human capacity to absorb and make sense is exceeded, managers cannot make decisions and employees don't know where to get quick answers [to questions]."[11] Under these conditions, attempts to "push" knowledge will backfire because there is no bandwidth for learning. Yet what industry is not facing information overload, turbulence, and increasingly rapid decision-making cycles?

Because story sharing helps people to identify critical unknowns and high leverage learning priorities, it generates the “pull” for new solutions that naturally leads to requests for help and transfers of proven practices as a part of the day-to-day work.

This “pull” is further amplified by the very act of composing our experiences into a coherent account, because making sense of the random, fragmented events of our lives frees up attention and the ability to absorb new lessons. For example, I once worked with a team to design a website providing background on new HR policies and tools for managers, as part of a transition to a high performance culture. In the midst of the project neither the team nor the sponsor was able to see the chaos caused by failing to balance relevance to the field with input from the executive team. Instead, we kept plugging ahead, accommodating each new change by working later and faster, sensing the increase in tension with each new crisis. It was only when the team and sponsor sat down together and actually physically drew the “rollercoaster” of the project’s history that we could piece together what was happening, make sense of our dilemma, and adjust the development process for the remaining phases of the project. As one colleague describes it, telling the story increases the Reflection phase of the learning cycle,[12] allowing us to clear our heads and see more clearly what we are dealing with. (See Figure 1 below).

Figure 1 – The Learning Cycle



Adapted from Pedler, M, Burgoyne, J and Boydell, T. (1986). A Manager's Guide to Self-development, 2nd ed, Maidenhead: McGraw-Hill and Kolb, D. (1984). Experiential Learning: Experience as the Source of Learning and Development. Prentice-Hall: Englewood Cliffs, N.J.

Then, as the members of the police department task force found, we are more likely to make effective plans or generalize to more valid principles, than when we short-circuit the process by jumping from experience directly back into action.

The Relationship Factor

Have you ever noticed that after someone presents a case study, they receive a wealth of unsolicited suggestions, references, and tips? Or after a speaker presents on a compelling topic, there is always a handful of people waiting to share their individual dilemmas and ask for advice? What is going on here? One way to describe it is that by sharing their experience or their expertise the presenter has established the beginnings of a relationship with his or her audience, a relationship that opens the channels for sharing ideas, best practices, and problems. Without that relationship, sharing is unlikely to happen. In fact, according to Dr. Szulanski's study, "One of the strongest predictors of best practice transfer was the strength of the relationship between the source and the recipient"[13]—which explains why the lack of pre-existing relationships between source and recipient is the third barrier to best practices transfer.

This issue is one reason communities of practice are emerging as the most effective vehicle for stewarding knowledge. These dynamic learning communities acknowledge and focus on building the relationships that are at the core of sharing expertise and best practices. It takes time, energy, and attention to learn a new practice or to teach it—and much of what motivates people to make that investment is a sense of reciprocity within a community: not a strict exchange, but a loose give and take involving mutuality, recognition, belonging and respect. And not just polite, social relationships (although those do help), but bridges built on credible expertise or a shared passion for a domain. And once such communities are developed, they become channels not only for sharing knowledge, but for innovation and new solutions jointly invented. [14,15]

But how do we actually create and deepen the relationships that enable learning? This is a question for those attempting to cultivate communities of practice as well as those aspiring to create a learning culture in project teams or work groups. One day, as my colleague, Terri Tate, and I were preparing to speak at a conference, I asked her what experiences she had had with building relationships that enabled learning. Here is her story:

> I had been working with a large urban pediatric hospital for many years when I had to go on leave due to my first bout with oral cancer. After I got through the worst of it, I got a call from the director of the Operating Room, and she said, "We'd like you to come and work with the techs, because they're not showing enough respect."
>
> Now, if you who have never worked in an Operating Room, bear in mind that the OR is the financial driver of the entire hospital, which in this case was the driver of an entire medical center. So keeping those operating rooms full was vital to the economic survival of the institution and the whole complex. In fact, it was a full-time job just to schedule the ORs. They were operating from 7:30 a.m. well into the night and on weekends. So, in the first place, getting people out to talk about their problems was not really an option. And secondly, there is obviously not a large margin for error in surgery—and when you are doing surgery on children, the margin for error is even smaller. So the pressure that built up in those rooms was unbelievable. Add to that a very strict traditional hierarchical structure in which everybody worked really hard, but there were vast differences in

status, compensation, and power. And then, as if that was not enough, they once told me that they consumed something like 400-500 cups of coffee every day!

So when the OR Director told me, “We want you to come and talk to the techs because they’re not showing sufficient respect,” I said, “I’m sorry, I can’t do that.” I said, “What I will do, is come and talk to everybody and see what you can do on a systemic level.” I knew in this situation it was not going to help to talk to the techs that were working as hard as everyone else and getting way less for it.

Now, it happened that the Chief of Surgery was a really amazing person, who said, “Ok, we’ll go along with this…whatever it is.” So we put together an interdisciplinary design team with representatives from all the groups in the OR to look at the issues and put together a program. We met briefly a few times and then had an entire daylong design meeting in which there were five, count them, five surgeons—which was miraculous in and of itself. But even more remarkably, by the end of the day, they had decided that their desired outcome for the program was to create a culture of respect across all the disciplines in the OR. And because the time that they could have people out of the OR was so limited, they decided to create to a play that showed current reality. The Chief of Surgery played the Unit Clerk, who had been there for 100 years and knew everybody’s secrets. And a tech played the Chief of Surgery! They designed this whole skit—they took a lot of their own time to rehearse and get the program together.

On the day of the program, they performed a 10-15 minute scenario of how everybody acts to each other in the OR—videotaping it for the people who could not be there. After the skit, people went back to their tables (each with a mix of disciplines), and talked about what they saw, what was happening on the job, and what they would like to do differently. And out of those discussions they came up with interdisciplinary teams that continued to communicate about issues and work together on an ongoing basis. They developed a newsletter to communicate stories about what happened on various shifts that people might not hear about. And they made a beginning toward a culture of respect. The amazing thing is that, due to the OR schedules, this event happened from 5-7 in the morning, and was redone at shift change in the afternoon.

Now, imagine if I had gone in there with the traditional model of, "I'm going to go around and interview everybody and then report on what is happening and let you know what the issues are…" Or imagine if I had said, "Ok, let's get together in a large scale event and process all of this, let's talk about your grievances with one another..." We would still be there! First, I would not have gotten them out of the OR, and second, there is no way there would have been enough time. This approach took just two hours, made a really lasting impact and established relationships that enabled learning from then on.[16]

Story for Community Development

This story and my own repeated experience have convinced me that story-sharing is one of the most direct routes for building the relationships that underlie community—or for deepening them once initiated. Disclosing how we came to our perspectives and knowledge is a way of inviting others to know us as a human being, rather than as an official "expert." It also naturally brings to the surface what we care about: the topics, crafts, or dilemmas that intrigue us. And listening to another's story is a tangible way to demonstrate our interest in their perspective—all the while allowing us to vicariously live and learn through their experience. The result is typically a sense of connection, shared understanding, and respect, regardless of whether we are talking about our most important life lessons, telling the story of our name, or explaining how we came to a technical insight.

I have observed this process repeatedly in a variety of settings, amongst people who have never met before, and people who have worked together for years. Even when relationships have been damaged by misunderstandings or business failures, the process of recounting what happened and why it mattered can serve to renew commitment and rebuild trust. For example, Terri and I had been working with several visionary consultants who wanted to initiate a learning community to dramatically improve the level of honesty and direct communication in their profession. Unfortunately, the conference they had planned to launch the community had to be cancelled at the last minute, causing them to forfeit tens of thousands of dollars in deposits and fees—and disrupting friendships of twenty years and more. Anyone would have understood if they resorted to bitterness and blame. Several months later, we led a debriefing session at their request. During the session, we asked them each to tell the story from their perspective—as <u>if they had never told it before</u>. This turned out to be so cathartic that, by the end of the day, they were able to return to their original passion for the idea, initiate several smaller scale efforts—and recommit to their friendships.

But building relationships does more than just open the way to sharing existing knowledge and best practices. When sharing and learning work, it is because they are intrinsically motivating—either because people share a passion for a domain, find a sense of belonging, reciprocity or recognition amidst a community, or recognize the opportunity to develop their effectiveness and capability by applying others' insights to their own work. Thus the critical elements of a community of practice—the domain, community, and practice—actually provide the motivation for sharing and accessing a knowledge network, and address the fourth barrier to knowledge transfer. For example, in the AQPC's studies of leading edge companies, O'Dell and Jackson point out that motivation for sharing and applying best practices is not provided through special rewards or financial incentives; in fact, many of those interviewed pointed out that such cash rewards would actually cheapen the value of what participants were creating. And it is these very communities that go on to develop new tools and practices, create new innovations, and occasionally discover the basis for a new value proposition.[17,18]

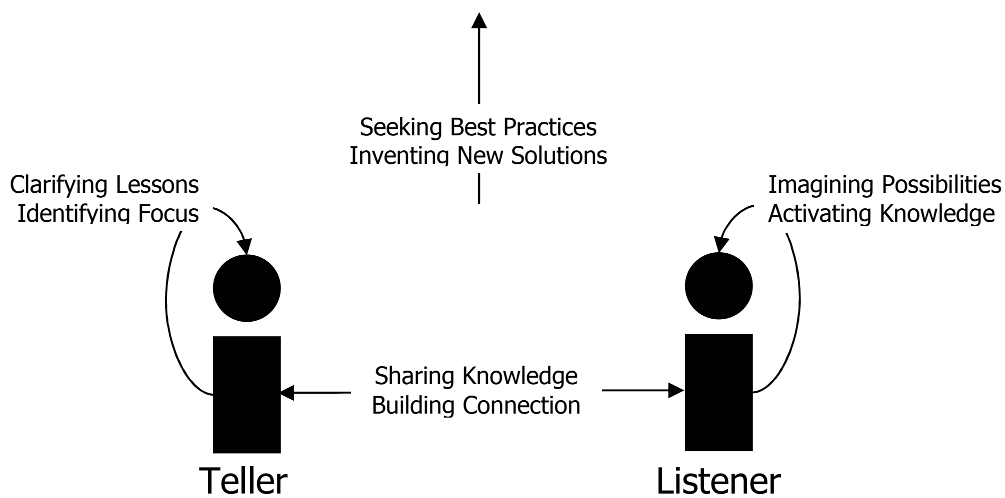
But communities of practice do not "click" automatically. It takes work to develop a true community, and some groups never actually make it. Community coordinators, shepherds that guide a community through its various stages, are in short supply and must draw on a highly developed set of skills. So any approach that can help deepen and broaden the relationships between members in a time-compressed way, early in the life of the community, is of immense value. Taking time to tell a community's stories is one way to do this. It reinforces the key drivers of the community's health—by deepening the engagement of existing members, and initiating new members into the collective story while allowing us to share knowledge and gain perspective on our own experience.

I recently saw this in a community of practice working through a transition in governance. It was moving to a model of shared leadership, and letting go of its reliance on the two thought leaders who had founded the group. In some ways, these two were held in awe by the majority of the members—and they were suffering from an excess of responsibility. So, they asked for help, largely by arranging for time to tell their stories—first in the bar at the annual conference and later with another group of participants by phone. The result was that these respected authors and leaders became human, causing others to see the need to step forward, which they are now doing. As we finished one of the storytelling sessions, someone said, "This was great. This was real community work."

Summary

So, what have we learned about using story to surface, translate, and apply latent knowledge, while building relationships and communities that learn? We have explored several examples to highlight how story-sharing can help people activate what they know, learn from others' experience, focus learning priorities, create a "pull" for best practices, build relationships that enable learning, and foster the communities that make sharing and innovating intrinsically motivating. If we were to summarize these dynamics in a simplified model, it might look something like this:

Figure 2 – Story-Sharing Dynamics



The point is that, through this relatively simple practice, you will be simultaneously re-activating and clarifying your team's knowledge and skills, surfacing best practices to be adopted more broadly, creating the "pull" for adopting those practices, and building the relationships that enable ongoing learning into the future. But, where do you start?

How might you give this a try?

The best way to start is to try an experiment. This is not something to be "rolled out" on a grand scale right off the bat, largely because it relies on your sense of what topic or question would be both useful and evocative. But there are relatively predictable situations where inviting stories will mobilize both learning and commitment.

If you are in the process of transforming your organization's capabilities, you might consider introducing a story-sharing session at any of the points described in Table 2 below:

Table 2 – When Story-Sharing Can Support Team or Community Development

Launch/Kickoff: To surface individual and shared purposes, engage commitment, build relationships, and create alignment around strategic opportunities

Getting Started: To surface and share knowledge, solve problems, create new solutions, and focus learning

After Action/Project Closure: To improve learning from shared experience and deepen relationships

Team Renewal: To build or re-build trust and commitment, and focus future learning

<u>How does it work?</u>

To give you a sense of what this might look like, let's walk through an example that you can adapt later for your purposes. At a recent conference for trainers and training game designers, my colleague, Kat Koppett and I led a problem-solving session based on this story-sharing approach. We started off with a game to identify relevant problems and topics. One person stood in the center of the circle of participants and called out a problem he or she had that mattered to them. Then, anyone who shared that problem had to stand and find a new seat. Since we had cleverly arranged for one fewer chair than necessary, there was always one person left standing—and now they had to call out a problem. One of us stayed to the side and took notes about the problems that were raised. When we noticed the energy flagging a little, we stopped the game, summarized the two or three main categories of problem and asked the group to choose one as a topic. This is pretty simple, and it usually helps to broaden the topic a bit, so it is evocative and invites unusual perspectives.

In this case, the topic the group chose was "convincing people," which came out of their shared concerns with selling their services, measuring value, and motivating program sponsors. We then asked the group to reflect a bit on their past experiences with convincing people—in any part of their lives. We gave them time to notice what images came up, select one, and relive it in their minds, with all five senses if possible. Then, after a few more seconds, we told them there would be time for five to eight people to share their experiences, for four to five minutes each. The only ground rules were that people could speak without being interrupted, they could choose what to share, we would all consider the content as confidential, and we would focus on sharing the experience more than analyzing it. In retrospect, we would probably also explain that so-called negative stories are part of learning and are quite valuable. Then we opened the floor for sharing. There were only a few hands at first, but after each person shared their story, more hands would go up—because, of course, stories spark us to remember more stories. There were stories about the futility of talking to parents, the surprise of discovering that a mistrusted colleague was open to collaboration, and the power of encouragement for helping us believe in what we are doing. After about 45 minutes, eight or nine people had spoken and we brought the telling to a close.

Then we opened a dialogue, asking the group what they noticed as they listened to the stories. Before we began, we asked people to refrain from giving advice or commenting in detail on a specific person's story. It was like opening a faucet; so many people had observations and insights to share. In particular, many people noticed a central theme about discovering or creating a connection with those we think we have to "convince." After about 20 minutes, we closed the session, asking for any final comments or implications for action that made sense. A good half of the participants spoke up about what they had learned or what they were going to do differently when they returned from the conference. And that was it. The entire process took just 90 minutes. Yet, in the words of one participant, "Through the stories being told, the dilemmas people surfaced actually got solved! People's wisdom was revealed and I received insights about my own dilemma that helped resolve the issue. In fact, I got to see that actually I knew what to do for myself all along! By the time the process was over, between the storytelling and problem solving experiences, I left the room feeling totally satisfied." [19]

Here is an overview of the agenda we used, which you might adapt for your own use:

Table 3 – A Sample Story-Sharing Agenda

SURFACE THE TOPIC (5 Minutes)

What dilemmas are you facing in your work with __________ [select an area]?

The common theme seems to be: _______, especially if we broaden it to include _______________. Shall we explore that as a topic? [Allow the group to choose.]

REFLECT (5 Minutes)

Now, let's think for a minute about our past experiences with _____________. What images come to mind?

Select one image and see if you can relive it in your mind--with all five senses if possible. What are you seeing? Wearing? Who else is there? [Allow a minute or so.]

STORIES (40 Minutes)

For those who would like to share what they came up with, we'll have time for _____ minutes each. I'll be the timer and I'll wave when you've got 30 seconds left.

All you need to do as a speaker is share your experience with us, in as much detail as you can. For those of us listening, our job is to offer our undivided attention -- some say that is what actually draws out the story. And let's set some ground rules about not interrupting, not giving advice unless asked, and keeping what is shared confidential.

Who would like to start? [Allow 40 minutes for stories.]

DIALOGUE (25 Minutes)

What did you notice? What themes or insights did the stories bring up?

Please remember our ground rules about not giving advice, and focus instead on larger themes.

Also, you might want to ask if it is ok before inquiring more deeply into a person's story. [Allow 25 minutes for dialogue.]

CLOSING (5 Minutes)
What questions come to mind now? What actions or commitments might make sense for you, based on what we've learned today? [Allow 5 minutes, then wrap up the session.]

Depending on your purposes, you can adapt this agenda by changing the topic or opening question. For launch meetings, it helps to be as broad as possible. For retrospectives, you might want to tell the story jointly (using a timeline on a flipchart or whiteboard). And finally, for team renewal, you might want to ask people to recall what it was that brought them to the team.

<u>How long does the process take?</u>

The single biggest reason people tell us they do not use stories is that they do not have the time, so it often surprises people how little time this actually takes. This is exactly what Stephen Denning found when he discovered that he had only 10-12 minutes to explain his new knowledge management strategy to an executive committee at the World Bank, and persuade them to adopt it. He was forced to cut his presentation to three slides and a story. But when he finished, the questions he faced were not on the merits of the idea or the cost, but why they were not already implementing it, and what it would take to go forward![20]

The same holds true for a group, on a slightly larger scale. Personally, I have found that starting with experience-sharing on a topic greatly reduces the time needed for discussion. I have been in six hour dialogues that seemed to just be gaining traction when it was time to adjourn—two hour story-sharing sessions where 30 minutes of dialogue on the themes was sufficiently rich to create clarity. And Kat, with whom I led the problem-solving session, recently had the same principle confirmed with a client of hers. She and her troupe of improv actors were asked to perform a round of improvisations to simulate how customers interacted with an everyday consumer product. Now it just so happened that this activity came a few days after the company had conducted a series of in-depth focus groups and customer observations. And, at the conclusion of their performance, amidst applause and laughter, the sponsor cried out, "I can't believe it, but you have just surfaced in two hours what we spent five days and $10,000 learning from focus groups!"[21]

Although this example and most of the others I have given benefit from being face-to-face, it is possible to do story sessions by phone. You will just have to pay more attention to involving everyone, allowing people time to turn off their "mute" buttons before speaking, and providing a "back channel" for questions and technical issues. And the stories that you surface in any session can be crafted in "knowledge stories" and shared more widely than just the immediate group—although you will want to get permission from each of the participants. Linking these knowledge stories to explanations and outlines of the best practices they describe is an effective way to motivate people to use a best practice, or provide an example that fills in some of the "tacit" features such as when, how much, etc.

What are the pitfalls in sharing stories?

I have found that the single most common pitfall is the temptation to give unsolicited and sometimes unwanted advice in response to a story, which is why it is important to set ground rules each time. It is also sometimes a strain to hold to agreements on confidentiality, especially when a story is particularly useful. In these cases, it helps to return to the teller and agree on an acceptable format for publicizing the story—giving them plenty of opportunity to edit and disguise specific facts as needed.

People often worry that it is not safe to share honestly in the workplace. Yet Terri, Kat, and I have repeatedly found that people are able to manage this quite skillfully if reminded that it is their choice whether and how much to share. Besides, even in organizations fraught with mistrust, people persist in identifying those they can trust and building small networks of allies with whom they can share openly. Building trust, however, does take work, especially when the goal is to share both positive and negative results openly. One strategy is to invite people to talk about near misses,[22] projects where they learned the most, or experiences that led to the development of new practices. A parallel pitfall is that people sometimes fall into complaining, scapegoating, or blaming—in which case my colleague, Terri, asks people to tell their stories as if they have never told them before, and listen as if they have never heard them before.

Finally, sessions can sometimes seem "flat," either because no one really dives in to what they care about, or because there is something more urgent that people want to discuss. When this has happened, I ask people what is attracting their curiosity or interest, and let the discussion move in that direction. Or, I laughingly acknowledge that sometimes there is really nothing to learn from each other and it is ok to adjourn early. Paradoxically, both of these strategies have surfaced some of the most insightful discussions I have yet seen.

<u>But are we really going to sit around and tell stories?</u>

This section is for Herb, my friend who recently retired from Chevron, and insists that I stay focused on what line managers can use to create business value (with a straight face).

There <u>is</u> a question of what to call this, and it is true that there are many places where you do not want to call it "storytelling" if you want to be taken seriously—at least not before you have tried it. The key, whether you refer to these activities directly as story or not, is to clearly call out the likely benefit, the <u>reasons</u> for exploring past experience, the importance of the question at hand.

For example, one day at a session to train a group of trainers to teach a complex, intimidating topic, I asked people to "warm up" by describing the last time they really learned something important. Briefly, before they started, I said, "I think this might help us stay oriented to what the learner could experience during our workshop." Without missing a beat, they went right ahead.

Now, this brings us to three surprises my colleagues and I have found along the way as we experimented with this approach:

- People are shockingly eager to dive into their experiences if asked—so much so that I often have to jump in and remind them of the choice about how much to share. Much of the experience-sharing I've seen comes from simply asking an interesting question at the right time.

- To a surprising degree, it does not matter who the participants are. People have said, "Oh, you cannot do stories here, these are physicians" or academics, or police officers, or lawyers, or vice presidents. Yet, when you dare to invite people to relate the experiences behind their thinking, most often they pick up the ball and run with it.

- In fact, most often people are more concerned on another's behalf than their own. That is, they are worried about putting other people in an awkward situation. The solution here seems to be to invite the meeting organizers to try the process themselves. When Terri tried this with a group of executives at a dot-com magazine, they insisted that she add <u>more</u> time for story-sharing to the leadership training they were designing.

So, you'll have to decide for yourself what you call it. Here are a few of the alternatives I have heard so far: "Critical idea generation," "Story research," "Experience mining," "History-storming," and "Knowledge exchange."

Closing Remarks

As Brown and Duguid's study of the Xerox technicians suggests, storytelling is actually quite common in the workplace. Our focus is to invite leaders to use it more systematically for knowledge discovery and community development. The process does not have to be a formal, sit-down session, such as we described in the agenda above; rather, it can be quite natural and informal, as when I asked the trainers to "warm up" by sharing an experience with learning. In fact, at its core, we are simply encouraging people to share the experiences that have shaped their thinking on a topic that matters. And with this simple social practice we enable them to "connect the dots" in ways that allow entire organizations to transform their capabilities.

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