

# Story as an Approach for Facilitating a Knowledge Management Innovation

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(Abstract)

The ontology of organizational story begs us to discover when stories work best and why. Is there a best practice for creating and telling stories? This study examined one organization's use of storytelling as a means of facilitating an innovation and what happened from the perspective of the storyteller. The study revealed the role of storytelling during the organizational initiative. This qualitative study analyzed eleven written and oral stories using grounded theory. Also using grounded theory, six tellers' interviews were analyzed to gain the tellers' perspective of the role of story. Storyteller selection was based on those who had consistently told the stories throughout the initiative and were interested in the effort being successful. The study revealed an implicit message that was intended to be understood in gaining full acceptance of the initiative. Based on the results of this study, the story promoting innovation contained four consistent characteristics: event, dilemma, consequence(s) and outcome. The true event used in the story was relevant and known by most personnel. The dilemma contained the implicit tension created when choosing to go against the organizational practice and norm. The consequence(s) in the story always conveyed success. The outcome represented the personal benefits obtained. To improve on the story used to promote the new knowledge management innovation, the organization might further examine its explicit and implicit norms and address the emergent concerns and vulnerabilities of the characters in the story.

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## CHAPTER 1: INTRODUCTION

Telling a meaningful story means inspiring your listeners—coworkers, leaders, subordinates, family, or a bunch of strangers—to reach the same conclusions you have reached and decide *for themselves* to believe what you say and do what you want them to do.

(Simmons, 2001)

### Overview

Memorable stories remain with us through time. Stories help us learn how to connect to and make sense of what it is we are engaged in within the organization (Boyce, 1996). We use stories to decide, resolve conflict, share guidance and to get information (Hansen, Kahnweiler, & Wilensky, 1994). We learn about our organization and how we fit within its culture (Wilkins, 1981). We orient our staff with story: videotapes of the company, the industry, the product or the service. We incorporate stories into the instructional design of our courses to reinforce learning. We use story to build better plans (Schwartz, 1996; Shaw, Brown, & Bromiley, 1998). Stories are one of the most important sources we have for finding out what is going on in the organizational environment (Martin, Feldman, Hatch, & Sitkin, 1983).

Storytelling is such an obvious way of communicating that little notice is given to those who purposefully choose to use story. What is it about story that has convinced these tellers that it is the story they tell that will get those who listen to take action? Workers do listen to the stories shared by others (Jordan, 1996). They learn what it is they need to do, or not do, to fit within the organizational culture (Wilkins, 1981).

Stories seem to play a significant role in organizational initiatives. Storytelling has long been used to instill tradition and present knowledge (Nonaka & Takeuchi, 1995). When adults hear new stories, they connect what they hear to what they know and to the relevancy of what is in their lives (Wlodkowski, 1985). By doing this, adults more easily remember the new information learned through the story, especially at that just-in-time moment when the adult needs to use the learned information (Greco, 1996; Honey, 1992).

A great deal of ambiguity exists in understanding organizational storytelling. For purposes of this research, organizational storytelling is defined as a form of discourse that combines several experiences of distant events told in a series of more than one statement to form a concrete example of a general principle that will allow a listener in a given situation to cognitively connect to the known, and then to the probable. The story is told for facilitating others into action.

The theoretical implications for studying organizational storytelling from the perspective of the teller are significant. Researchers have looked at organizational stories from the perspective of the tellers as employees and organizational leaders sharing cultural cues and

messages. Since the beginning of human kind, philosophers, teachers and leaders outside of organizations have used stories for motivating others into action. This study is meant to provide insights into how organizational storytelling can be used in the adult learning process, particularly in the organizational environment for introducing a new effort within the organization.

Organizational stories can be a means of projecting situations in order to look at the whole (Mitroff, 1983). Yet, while looking at the whole, one must consider that the story context only has meaning and purpose within the organization from which is it taken (Boje, 1995). Stories can be the scripts that lay the groundwork for the future of the organization (Wilkins, 1981). Most people recognize they are listening to story, but most do not realize how easy it is for them to connect back to that story at some later point and remember it. (Cortazzi, 1993). Stories have been shown to have specific characteristics when shared in the framework of projecting organization folklore. They almost always have a subject, an object, an initiating force, an adversary, an outcome and the help needed (Mitroff, 1983).

Regardless of the context, we know stories' meanings are understood and internalized within organizations, whether positive or negative (Hansen & Kahnweiler, 1993). Organizational leaders know they have the power to influence readiness by intentionally reshaping their corporate stories (Wilkins, 1981). Although stories can be used for positive change, they are sometimes used to manipulate the organizational system. For instance, leaders who share their vision through story are more apt to inspire and motivate others within the organization (Senge, 1990). Leaders tell stories sometimes intentionally and often times unintentionally to convey significance of purpose or vision. They use story to guide employees into action to solve problems. They tell stories to share how they overcome difficulties with organizational transitions or changes. Stories end up playing an important role in the process of shaping the behavior of the organization (Mumby, 1988). These notions open the door for further exploration.

We regularly integrate the use of stories into adult learning courses. Stories are used as a means of connecting new information to a relevant situation that aids understanding. When adults hear about something they are familiar with, and understand how it connects to what they do, they are apt to retain the new information long enough to attempt to put it to use (Wlodkowski, 1985).

Understanding the use of story in organizations as a means of sharing tacit knowledge or new ideas has been emerging in recent years. Thirty years ago, Shell Oil used stories to help it consider alternative operations during the oil crisis (Schwartz, 1996). One manager at 3M presented his annual strategic plan in the form of a story (Shaw et al., 1998). In each of these situations, stories were used to enlist participation in a solution through dialogue.

The intentional use of story and its impact within organizations is still emerging. The focus of this study is to discover more about organizational story use. One organization developed stories and told those stories during planned presentations as a means of intentionally initiating a new program and gaining employee buy-in. This organization is now recognized as one of the leading organizations in the area that it promoted during the presentations. The director of this initiative believes that his use of storytelling during presentations was instrumental in the organization's success.

### Background

The director at a large organization boasted that his success in gaining buy-in to a company-wide knowledge management initiative was the result of using storytelling during the initial rollout presentations. He was so convinced that the storytelling techniques were key to facilitating change that he began teaching others his strategy for building an effective story. The Director and I met in early July 2000 as a result of my looking for a topic focus for my interest in storytelling. The Director gave me some background information that he considered critical to understanding the organization's culture and purpose.

In the mid-nineties, this organization decided to rollout a knowledge management program. This large financial organization serves a multinational clientele. The organization is very traditional in its operations. The consistency of its operations contributes to its success servicing worldwide programs.

Senior management called in a well-known consultant to draft a model/framework based on industry best practices for what knowledge management would look like within this organization. The team had to shape the consultant's work to fit the organization.

The director found that gaining buy-in from the organizational staff did not turn out to be as easy as he and his team had imagined and was unsure of his next steps on how to make this effort successful. There had been many prior attempts to introduce knowledge management

and they had all failed. The staff saw this latest initiative as another “passing fad.” If they just sat tight long enough, it would go away (per conversation with staff member). This organization’s culture has been described as somewhat closed and steadfast. One staff member claimed that the majority of workers were very dedicated, committed and quite introverted. However, they were reticent to embrace new ideas or initiatives. The culture had always been hierarchical and reflected a contemplative atmosphere (per conversation with staff member and director).

After hearing one of his colleagues share a story over lunch about how a third world health services worker in a remote village of Kamana had found the treatment for malaria over the Internet, the director of knowledge management decided the story should be retold. Up until that point, the director’s presentations were not creating action or interest. He knew that people within the organization saw themselves as equivalent to bankers, not managers of knowledge. Financial institutions give loans, process loan paperwork and see to it that payments are made. Sharing knowledge was not something that financial employees considered relevant to the work of the bank. In fact, they considered knowledge management to be a distraction to the bank’s core business and income-producing operations.

In an effort to shift the employee mindset, the director decided to tell the health service worker’s story at the end of one of his brown bag lunch presentations. His intent was to help the employees see how knowledge sharing could be critical to their own initiatives and gain more respect from those with whom they do business. For the first time, people were asking questions rather than debating (Denning, 2001). The listeners questioned whether the story was true. They asked which organization donated the computer to the small, remote Village. They wondered if their organization was involved. When they learned that it was not, they wanted to know why. The director thought these were all good questions that would stimulate their interest in the initiative and facilitate their divisions’ efforts toward managing knowledge.

Given the interested responses and the realization that the only thing that he did differently was share a story, the director began to intentionally collect other relevant stories from various departments to integrate into his presentations. Each of his stories presented a true scenario, relevant to the group he intended to talk to next. Each time he believed that he was gaining more buy-in. He was further convinced when people came to him and asked for further guidance on how they could make knowledge management work within their units.

The director was so convinced that he had stumbled upon something unique that on a visit to Massachusetts Institute of Technology (MIT), he asked MIT to study the storytelling phenomenon. He demonstrated how he had built stories by strategically selecting critical information from a variety of wires from other countries. He shared research on the effectiveness of storytelling and what he had learned by talking to professional storytellers. He discussed how using story in his presentations improved listener engagement and ultimate buy-in to the initiative. MIT declined to undertake the study.

Undaunted and convinced that this was a topic worthy of study, the director was receptive to me conducting this research study. We discussed his level of support for getting me into the organization and how likely the personnel who made the presentations would be to discuss their perceptions of the listeners' reactions to hearing story.

### Statement of Problem

Stories can be social maps, the fabric that describes uniqueness and the means of conveying organization philosophies. While it has been claimed that stories inspire and encourage engagement, more research is needed to demonstrate this. We have studied how to uncover stories in organizations and from within their occupational groups (Boje, 1995; Greco, 1996; Grundlach, 1994; Hansen et al., 1994; Martin et al., 1983; Wilkins, 1984). We have studied the stories to determine their meanings: what is the boss like, what will get me fired, how do I get promoted. We have not looked specifically at how stories are used to encourage others to take action.

Adults cognitively connect to what they know when in an adult learning situation and stories is just one of many approaches that make that happen (Boyce, 1996). If this is true, then one should be able to use stories for helping to initiate positive change. We do not know how creating change with story is supposed to happen, or whether there are specific ways to create or tell a story that will produce change. We do know that organizations perceive their stories as unique within their culture (Martin et al., 1983). A great deal of the empirical research is focused on stories that drive cultures and subcultures, not on intentionally created stories used for specific business activities within organizations. Shell Oil is one organization that intentionally used stories to help workers consider and create new possibilities, as did 3M when its representatives used story to engage its Board of Directors to buy-in to a proposed initiative

(Schwartz, 1996; Shaw et al., 1998). In other organizations, the stories were told in fragments, never in the same sitting, and were only relevant in the context of that organization (Boje, 1998).

Instructional designers believe that storytelling is sometimes instrumental in facilitating a change in attitudes, values and feelings (Caffarella, 1994). Story can become the vehicle that builds positive experiences about the new subject being introduced (Wlodkowski, 1985). Studying an organizational environment where story is intentionally used as a means of getting adults to learn a new way of doing business can build on the ontology of storytelling and add to empirical research on the subject. It can also further practitioners' understanding of how story contributes to the field of adult education.

The organization studied serendipitously found that stories were getting the point across better than other means used to introduce the new initiative. It was important to discover what happened within this organization for it to be convinced that the attendees were responding to the initiative better as a result of listening to story and, consequently, taking action based on what they derived from the story. The findings of this study add another level of understanding of how facilitators, instructors and teachers use story in the adult learning process.

Stories, in the context of the organization studied, are concrete examples of the principle of knowledge management. The stories were intended to demonstrate the applicability of the principle within the organizational environment. The principle was clearly represented in the stories and the stories had sufficient parallel with the situations faced by the organization, including the consequences of applying the principle in the organization, to serve the intended purpose: to persuade staff members to embrace and use knowledge management.

The goal for this study was to understand why the organizational storytellers believed that stories were best for promoting the organization's new initiative. I came to understand the presenters' perspectives on how they came to use and create stories and what happened as a result. I discovered the elements used to create the stories and how the results could be presented when using all the elements. I found that this organization's stories did reflect organizational culture (Boje, 1995; Martin et al., 1983; Wilkins, 1984).

### Purpose

From the adult learning perspective, it would be helpful to know whether the presenters achieved the desired results. Understanding how each story selected conveyed the principle

intended was important. Also important was gaining perspective on how the teller knew the audience was willing to embrace the principle to the extent that they would take action.

The purpose of this study was to better understand, from the perspective of the teller, how storytelling functioned as an approach for getting people to take action. The study involved interviewing organizational presenters who were tasked to introduce an organization-wide initiative. The organization was selected on the basis of the work carried out by the director of the initiative. The director was the first to intentionally use story as an approach for introducing the organizational principle. The story was initially integrated into the introductory presentation of the initiative rollout. As time went on, the story became the presentation.

The unit of analysis for this study was the story. The stories used were taken from written stories on the organization's web site and from the stories shared during the interviews with the storytellers. The storytellers' interviews also contributed to understanding the intent of the story.

### Research Questions

The contents of the interviews and the stories were subjected to qualitative analysis, grounded theory. The focus of the research is outlined in the questions presented below.

#### MAJOR RESEARCH QUESTION

Q1: From the perspective of the storyteller, how did storytelling operate as an attempt to influence the acceptance of a knowledge management initiative?

#### 1. SECONDARY RESEARCH QUESTIONS

Q2: What were the story characteristics?

Q3: How was the nature of change portrayed?

Q4: How was the generality of the story to the local situation accomplished?

Q5: How did the storyteller select the story?

Q6: Why did s/he structure the story in the way that it was constructed?

Q7: What was the storyteller's perception of the impact of the story?

The above questions were answered through careful questioning and qualitative analyses. The interviews and the stories told revealed what I needed to know to answer the research questions. Interview questions were prepared and reviewed prior to use. Before each interview, I stated my full intention and the inquiry's purpose to each person involved. I asked all

interviewees to sign an informed consent. All data was coded through the means of open and axial coding. I created storyline aggregating codes from the interviews and the stories were analyzed for patterns and themes. The patterns and themes were examined and reported.

### Summary

This chapter outlines the primary focus of this study. The study involved examining how story was used in the context of an organizational change initiative. The literature review that follows includes a more detailed discussion of storytelling within organizational environments and as narrative analysis. It describes the problems researchers have defining story, describing its function and determining how it really works within the organizational environment. It also describes how the use of story emerges in organizations and what story has been shown to do. The review also demonstrates how story has been analyzed as narrative. The literature review provides the background for the subsequent methodology, which outlines the research design. The methodology chapter addresses methods used to answer the research questions and takes into account the issues of validity and reliability of the research design. The data analysis section summarizes the strategies for analyzing the collected data.

## CHAPTER 2: REVIEW OF LITERATURE

The mutual attentiveness of teller and listeners makes the storytelling a collaboration, a communication *between* rather than a broadcast *to*.

(Cohen & Prusak, 2001)

### Introduction

The research was primarily concerned with understanding the use of story. In this study, the understanding is derived from three sources: written stories, oral stories and from the perspective of the storyteller. The research on storytelling provides the foundation for determining how organizational storytelling is currently perceived. It provides a view into the perceived value of story, what story does in organizations and how story emerges in organizations.

This chapter is presented in three sections. The first section deals specifically with the definition of storytelling. It discusses the term storytelling and explains how the term is used to bind the research endeavor. The second section describes the function of storytelling. Research efforts are reviewed and various sources classify different functions for what story does. The third section focuses on the existing body of knowledge related to storytelling so that we can understand why this study of storytelling is an important pursuit.

### Defining Organizational Storytelling

The first major obstacle in the review of literature is interpreting the various definitions of what constitutes organizational storytelling. The basic problem is not only in how to define storytelling, but also how to describe the function of story. A few researchers have already defined organizational story. Hansen, borrowing from Feldman, claims that stories shared in organizations are “socially constructed accounts of past events that encode culture and are therefore important to members of the organization” (Hansen et al., 1994). David Boje (1995) asserts that story is an “oral or written performance involving two or more people interpreting past or anticipated experience.” In this definition, stories do not require beginnings, middles and ends. Joanne Martin (1983) defines organizational stories as the narratives that are shared because something outstanding or out of the ordinary has happened. Grunlach (1994) defines stories as “a common form of discourse, usually in context of conversation, which tells an event in a series of more than one statement”. Stories function as a means of “packaging an experience of a distant event into a form that will allow a listener in an immediate situation to grasp its significance.” Borrowing from Grunlach’s (1994) language to build my own definition, stories in the context of this study are a form of discourse that tell of an event in a series of more than

one statement. For the purpose of this study, storytelling is defined as a form of discourse that combines several experiences of distant events told in a series of more than one statement to form a concrete example of a general principle that, when told in a given situation, is intended to allow listeners to cognitively connect to their immediate situation that aligns with the principle. The story is told for the purpose of facilitating others into action.

### Functions of Organizational Storytelling

Story is usually shared informally with the purpose of conveying a message for the teller. This means that there is some connection between the sharing of story and what story does when heard. Stories have a way of inviting participation (Wilkins, 1984). My instructional design colleagues and I realize how well story engages participants in the learning environment. We incorporate stories into our designs to reinforce learning. We produce videotaped stories to invoke emotion for potential allegiance during new staff orientation. We create and teach others to create scenarios of various future possibilities so that we can build effective plans. We get participants engaged in considering change and thinking of new and different ways of acting, working and behaving. We know from experience that it is story that gets people engaged in what we are attempting to introduce.

Hansen, Greco, Martin and Boje (1998; 1996; 1993; 1983) have been studying stories as a systemized strategy for creating viable employee learning opportunities. In an effort to use stories as a learning technique to improve managerial responses and abilities, Hansen and Kahnweiler (1993) brought together middle managers from Delta Airlines, Coca-Cola Inc., Marriott Corporation, Equifax and Xerox. Managers shared their stories with each other in a group. The stories revealed the managers' sense of ego, level of conflict management, impression of others in their organizations, ability to make decisions and interactive behavior. Greco (1996) wanted to know what the managers learned from each other, so she further investigated this sharing of story.

During a 3-week seminar held once a year, Greco (1996) learned what attendees did when listening to others' stories. The goal of the seminar was to help executives change their behaviors and perspectives. The discovery was the response received from the executives after returning to their own environments. The executives most remembered the stories they had heard from other executives during the learning event. The stories enabled them to change their

behavior patterns by reflecting on those stories first, as if they learned their lessons through other's actions. In most cases, these executives claimed that they chose different actions than they would have in the past. These changes in actions were made despite their own embedded company culture and mental images or models (Boyce, 1996).

Martin, Feldman, Hatch and Sitkin (1983) found that cultural patterns run deep within some organizations. Stories shared in their study revealed organizational themes. Story themes such as "Is the boss human?", "Can the little guy make it to the top?", "Will I get fired if I do something that challenges authority when they are wrong?", "Will the organization help me move?", or "How will the boss react to mistakes?" emerged.

Martin et al (1983) claimed that each corporate story had a consistent negative or positive pattern. They also stated that another organization could use these patterns as a means of learning to overcome or promote patterns of their own. Organizations found that employees use negative organizational stories to learn how to beat the system. To overcome this, organizations looked for the positive stories and, after considering them carefully, intentionally incorporated them into the learning process.

Martin et al (1983) also found that dualities of tension exist within many organizations. Although organizations claim they are unique in action and activity, research revealed that there are concerns common to all organizations (Martin et al., 1983). The most common concerns shared in story reflected dualities of tension that could be separated into themes: Equality vs. Inequality, Security vs. Insecurity and Control vs. Lack of Control. The dualities suggest how employees attempt to determine where they fit, how they are motivated and whether or not they are satisfied.

Similar to the dualities and from an academic viewpoint, teachers intentionally include positive and negative messages in stories. Teachers found that students most connect and remember stories that are told with specific criteria that introduce opposing concerns (Cortazzi, 1993). Teachers create curriculums that include opposing issues called binary opposites. Examples of binary opposites are Change vs. Stability, Dependence vs. Independence and Survival vs. Destruction (Cortazzi, 1993 p.18). The notion is that students better identify with struggle. Students tend to understand more complex issues when both sides of the binary opposites are presented in the story, similar to identifying the dilemmas of good versus evil in fairytales (Bettleheim, 1975; Cortazzi, 1993).

Community initiatives often present issues that are similar to the common dualities and binary opposites (Cortazzi, 1993; Martin et al., 1983). Community leaders use story as a means of motivating citizens to take action for social betterment (Rothman, 2001). The dualities of equity, security and control, and the issue of survival vs. destruction, often emerge in these community stories. Citizens are more motivated to take action when they feel empowered to improve their situation. The stories relay how others took action against an opposing force to successfully impose change from the grassroots level. The messages in these stories build community cohesion (Rothman, 2001). As is the case in organizations, the stories are told repeatedly until a simple reference to the story theme or main character conjures the story and its outcome in the minds of the citizens (Boje, 1991; Rothman, 2001).

Once repeated a few times, a story does not need to be retold in its entirety in order to be effective. The subsequent sharing of the story can be done in pieces. In fact, most of the stories Boje captured in his office supply study were only bits of stories told. He had to put pieces together to form a whole story. Boje claimed that everyone knew the rest of the story by just the mere mention of one piece. The pieces repeated over and over represented the theme. Boje asserted that it would be rare for the piece or theme of a story to mean anything outside of the organization.

Whether whole or in part, stories tend to capture the imagination. Children love to mentally escape into stories. They become the character through identification and create their own journey while the story is being told. They imagine that they are experiencing the same struggles as the character they have chosen to identify with (Bettleheim, 1975).

Similarly, adults tend to listen for stories within the workplace that identify struggles that are similar to their own. These common struggles relate to the dualities of tension (Martin et al., 1983). Stories in the workplace depicting common struggles relay how safe employees are when changes occur. These stories also relay which rules can or cannot be broken, who can break the rules and what the consequences are for breaking the rules. The stories also reveal who has control within the organization.

Contradictory or opposing struggles and issues have a way of emerging in stories and impacting change within communities, organizations and individuals. Feldman found that change was at the root of distress surrounding organizational values, norms and practices (Feldman, 1990). His study revealed that stories are often created as a way to share information

that supports or challenges the cultural understanding of the organization. These incidences over time take on a new reality that differs from the original. Sometimes the stories reflect what should have happened rather than what did happen within the organization. Feldman believed that the story transformation significantly contributed to the reconstruction of the organizational reality.

### Activities of Storytelling

Many researchers have claimed that stories guide organizational leaders, assist planners in forecasting, create more realistic images for strategic planning and help employees focus (Boyce, 1996; Hansen & Kahnweiler, 1993; Martin et al., 1983; Senge, 1990; Shaw et al., 1998; Wilkins, 1981). Additionally, organizations have decided that storytelling is an effective technique for transferring information and knowledge to adults.

Senge (1990) claims that story is essential to one's ability to lead. Leaders with good stories sell employees on the vision and values of the organization (Little, 1998). Story helps people connect to a sense of purpose (Senge, 1990). When the leader's story is believed and shared, employees exhibit a broader commitment and concern for producing. Executives at Herman Miller, 3M, IBM, Lockheed, Boeing and Hanover Insurance practiced this strategy in exercises that helped build their corporate vision (Senge, 1990).

While working on leadership development using story, developers realized that organizations could also benefit from story. Systemized use and recognition of storytelling grew. In an effort to get managers to think about the future of the company, Argyris (1992) conducted exercises during which he had organizational managers write a story that framed a problem. He then had the managers describe how they would solve the problem. After managers wrote a brief scenario on the right side of the page, Argyris had them write their thoughts about what happened in the scenario on the left side of the page. Even if the managers did not say what they thought, they were to list their thoughts. Although managers may not have asked others to do what they expected, they were to write what they expected others to say or do. At a later time, a group of social scientists, business managers and journalists from MIT expanded on Argyris' idea and created the technique to perfect building what they called the "learning history" (Kleiner & Roth, 1997). The MIT group asserted that participants, like Argyris, were afraid to discuss organizational issues openly when in the politically charged

environment of the organization. Learning the meaning of a project or event through storytelling overcame those barriers.

In the process of listening to employee stories, organizational development consultants found that employees connect better to stories that represent what they do (Kleiner & Roth, 1997; Senge, 1990). By recognizing the personal connection, even when it creates tension, employees find themselves cognitively involved.

Intentionally creating stories for learning shows up in the military during World War II (Schwartz, 1996). During the War, the military used a method of planning that introduced the notion of storytelling. The United States Air Force created imaginative stories to determine or guess what their opponents might do in different given situations. From these stories, or as they called them, scenarios, the military calculated their moves strategically to quickly deflect any of their enemies' anticipated actions.

In the 1960's, Herman Kahn brought the military's technique of creating stories into the business world (Schwartz, 1996). Kahn sought to improve organizational operations by anticipating future business actions. Building on Kahn's technique, Pierre Wack encouraged the Shell Oil Company in the early 1970's to create potential stories given projected calm and volatile environments. Wack saw mounting contention within the Organization of Petroleum Export Countries and he recognized resentment building between the Islamic nation and Israel as a result of the Arab-Israeli six-day war. With the increasingly political environment, a series of "what-if" stories created by Wack began to change and impact the thinking and behavior of the drillers, refiners and administrative staff. The stories were used as operational exercises for identifying solutions and alternative ways of operating. As a result of having used the stories in practice, complete with making major decisions, Shell's staff was emotionally prepared to handle the 1973 oil embargo (Schwartz, 1996).

Only in the last few years has another organization revealed publicly that it began to use storytelling as a strategic planning tool. The 3M Company has always been known for being the innovative storytelling company, but it never used stories to project future possibilities for internal strategic planning until recently (Shaw et al., 1998). Shaw, Brown and Bromiley claim that 3M executives usually came to the table with a list of points as their strategic plan. Lists or bullet points do not explain critical assumptions, though, and they began to build a narrative. By collaborating to build a narrative, or story, the door was opened for dialogue, more obvious

possibilities were presented and there were no hidden agendas. Company executives could see the big picture instead of only pieces of data. The strategic planning story at 3M ended up building trust and honesty, and increased the accuracy of understanding by others in the company. Even though that had not been the initial method of planning, the story became the learning tool that helped build and plan for future possibilities.

Hansen and Kahnweiler (1993) found in their research that the telling of organizational stories, whether of past events, challenges or personalities, helped employees focus on what they needed to do differently in the future. Schwartz (1996) stated that organizational stories help employees learn how to work in volatile environments. Stories give employees a map of the past to build from in the future (Wilkins, 1981).

As a means of mapping the past to the future, storytelling is more commonly incorporated into instructional design processes. The increased use of video vignettes, case studies and role-plays help share the story of how the organization wants its employees to behave. Books, videos and case studies are appearing with regularity with stories modeling organizational dilemmas in management, organizational preferences of action and organizational problems to be solved. The *One Minute Manager* series, *Millers Bolt*, *Confessions of an Unmanager* and Jerry Halve's *The Abilene Paradox* are examples of managerial stories used to guide management thought.

Instructional designers vary the use of stories to ensure learning strikes an emotional chord. One organization that uses storytelling as a specific learning technique is the American Red Cross. While working as an instructional designer with the Disaster Preparedness division at the American Red Cross national headquarters, my team recognized the value of stories that trainers could share while teaching. Disaster preparedness instructors were usually active volunteers in disaster relief operations. They would return home after a relief operation and talk about how they had provided services during relief operations. When these same responders taught classes, they would spend most of their time telling disaster stories: problems they encountered and responses from victims of disaster. The instructional designers, recognizing how powerful but time consuming the stories were, built story allowances into the program. Trainers could present the prepared material in the classroom and share their experiences at just the moment when a good emotional story would help reinforce the learning.

The American Red Cross Health and Safety Division commissioned a study to discover how it could entice a younger generation to take The American Red Cross First Aid and Cardiopulmonary Resuscitation (CPR) classes. The study recommended that the participant workbooks be redesigned to look like the popular *People Magazine*. In 1993, The American Red Cross released its new First Aid and CPR material in the magazine, story-style format. Stories were used to tell the reader why learning CPR was essential and when CPR must be used. Stories had to be told in the language of the target audience and retold in a story to provide a framework for learning (Jordan, 1996).

Diversity trainers are using story to identify employee biases. A New Jersey Consulting firm and the organizational development team at National Public Radio (NPR) use the holographic technique discussed in *Images in Organizations* (Morgan, 1986). This technique helps the Human Resources Department craft feature stories about how they want to be perceived in the Public Radio industry. This technique is based on writing a story about how you perceive your unit and where you see your unit in the future. The consultant claims that one unit's perceptions are reflective of the entire organization. Breaking down barriers to relationships and reconstructing how those relationships should be is critical to honest inquiry and more effective work (Greco, 1996).

Community activists use story as a means of facilitating action (Rothman, 2001). Activists will share a story that reflects the issue of the day. The story typically describes how someone else went through the struggle they now face and explains how they were empowered at the grassroots level to beat or stand off an important issue or endeavor. Like the Texan cry "remember the Alamo", activists will refer back to the theme of the story to help citizens feel empowered to make a difference. Story explains consequences in a way that makes it easy for citizens to understand, better equipping them to make decisions that are best for their communities (Freire, 1993).

### Summary

Stories have staying power. We tell stories about work, about our organizations and about each other (Cohen & Prusak, 2001). We tell stories to share organizational history, interpret organizational signals and project the future of the organization. Stories offer salience. If they offer a certain amount of wit, are succinct and strike one emotionally, they are more

likely to remain in our memories. Stories have an oughtness and prescriptiveness to them. They help us make sense of where we are at that moment. Listening to a story offers a certain amount of comfort. Stories endure.

This chapter sets the stage for understanding how others are researching and using storytelling within the organizational environment. The next chapter describes the research design for this study in greater depth.

### CHAPTER 3: METHODOLOGY

The researcher who pursues storytelling as part of a broader ethnographic project, without specifically seeking to elicit stories, may be charged with pursuing research agendas hidden from his or her subjects.

(Gabriel, 2000)

### Introduction

This chapter describes the methodology for studying the stories used during one organization's knowledge management initiative. It presents research questions and the strategies for collecting and analyzing story data. It describes the unit of analysis and the process for finding the meaning of the data.

The organization whose stories were studied was undergoing a major reorganization and re-establishing corporate vision as a means of remaining competitive in the world financial market. A new vision that emerged for the organization led it to shape itself as a knowledge resource for international development (Fulmer, 2000). Establishing itself as a knowledge resource required a concerted focus toward knowledge management. Teams of personnel were formed and assigned to direct and describe how this latest innovation could work within the organization. To get the message out, several approaches were used. The storytellers believed that after the use of story in the presentation, listeners began to ask more questions about the initiative and engage more in conversation. According to the tellers, the stories were designed to discourage staff from using the previous long standing practice and to promote the benefits of practicing the new innovation.

The purpose of this grounded theory study is to examine and understand those stories used as a means of getting adults to take action. To best understand the stories, I interviewed the storytellers to gain their perspective. Many of the tellers found and created the stories shared during the knowledge management initiative. The tellers were the original members of the knowledge management team responsible for introducing the entire organization of over 10,000 employees to the new initiative with the intent of getting the employees to embrace and integrate the initiative into their own work processes. This team gradually incorporated the use of these stories into all of the presentations given to the employees.

I conducted the study as objectively as possible to see what effect story was perceived to have within this organization. I allowed phenomenon to emerge from the data. I found the inductive process to be meaningful and worth the effort (Strauss & Corbin, 1990).

The steps for conducting this qualitative study were: a) identifying candidates, b) obtaining informed consents, c) collecting data, d) coding and analyzing data, and e) writing and presenting the findings. While identifying and obtaining informed consents, I ascertained the stories and began coding each one. I was able to code each story before interviewing the

presenters. This allowed me to eliminate interpretation bias that could occur if the stories were coded and analyzed after talking to the presenters. After the stories were coded, I began to interview each candidate. After each interview, I applied open, axial and selective coding to the interview data. Once all of the interviews were completed, I examined the collective codes from the stories and the collective codes from the interviews, and looked for themes and patterns.

### Research Questions

My questions were stated in a way that allowed for flexibility and freedom to explore the phenomenon (Strauss & Corbin, 1998). With that in mind, the major research question asks: From the perspective of the storyteller, how did storytelling operate as an attempt to influence the acceptance of a knowledge management initiative? Within that question, several topics were explored. The topics are:

- 1) What were the stories told and their characteristics?
- 2) How was the nature of change portrayed within the story?
- 3) How was the generality of the story to the local situation accomplished?
- 4) How did the speaker select the story?
- 5) Why did s/he structure the story in the way that it was constructed?
- 6) What was the storyteller's perception of the impact of the story?

Discovering the phenomenon was critical to making this study viable. In the first question, I was able to determine the tellers' rationale for using story as a means of getting others to embrace the change initiative. The exploratory questions offered insights into what the story creators were thinking or considering when building the stories, how they determined story criteria and the structure for presenting the story orally.

### Data Collection

The interviews and the stories created provide the data to be collected. Six presenters out of a pool of seven were willing to share their experiences and processes during the rollout of the change initiative. The presenters were selected based on their involvement in the initiative, specifically those who were involved since the start-up of the initiative. Those involved in the start up were expected to best understand the organizational makeup and the nature of the groups that attended the sessions. These presenters had presented more than twice and used more than

one of the stories. These criteria enabled me to discover the presenters' perceptions of differences between sessions and responses within those sessions. The presenters who volunteered provided in-depth and insightful perspectives. I interviewed the presenters until I believed that I reached a point of saturation or redundancy.

The organization shared with me the stories created and told during the rollout of the initiative. I analyzed a total of eleven stories; six were written and five were shared orally by the presenters. The purpose for analyzing all the story narratives was to discover the story characteristics and to attempt to understand what the stories were meant to convey.

Each interview candidate signed and agreed to the Virginia Polytechnic Institute and State University Informed Consent for Participants of Investigation Projects. The form explained the project purpose, procedures for participation, risks and benefits, confidentiality of the data, their freedom to withdraw and their commitment for me to tape the interview. Additionally, it stated that the study did not provide compensation.

The presenters were interviewed in one-on-one interview sessions. All interview sessions were conducted in a private space within the organization. The interviews lasted an average of 60 minutes in length. All interviews were audio taped and the tapes transcribed.

The interview questions were used as a means of guiding the interviews, however I allowed the interviewees to discuss at length how they selected the stories, how they knew which stories were the right ones for the group to whom they were presenting and the consequences they expected to produce. The opening instructions to the presenters were that I was looking for their perceptions on what occurred during the knowledge management rollout. I encouraged them to talk about how they prepared for these sessions, particularly how they chose and told their stories for each session and how they perceived these sessions as different from other sessions where the format had been different.

Interview and story narrative data were reviewed for accuracy. The interview data was reviewed by three entities: transcriber, interviewer and colleagues. After taping the interview, a transcriber provided me full written documentation of the interview. I reviewed each transcribed conversation with the tape-recorded interview. The story narratives were provided directly by the organization from their website.

### Analyzing Data

To discover the phenomenon and not predict what should or shouldn't be found, I was able to analyze the data to reveal what role story played and the presenters' purpose for using story, including why they believed stories worked, how they picked a story and how they selected the properties of the stories that had the most strategic value.

In keeping with the principles of a Grounded Theory Case Study, I had to step back from the data from time to time, maintain an attitude of skepticism and follow research procedures. It was a painstaking process. I had to minimize my own bias, yet allow my experiences with story and storytelling to help inform me as to what the data revealed.

Grounded theory employs systematic coding procedures. I transcribed and coded the entire interviews and the narrative stories told, forming storylines and analyzing a set of codes and patterns. Open coding initially revealed that each story contained codes that described the event, dilemma, request for help, responses from multiple colleagues, timely response and satisfied customer. Also revealed in the story was the description of a long-held practice and a request to ignore that practice.

Based on Strauss and Corbin Qualitative Coding techniques, I carefully examined each data set (Strauss & Corbin, 1998). Following these procedures required me to closely scrutinize the data codes. After systematically putting data into categories and linking those categories to subcategories, I integrated and further refined the categories by writing a storyline. I was rigorous and diligent in following the methods. For instance, examining the dilemma based on the story seemed straight forward. However, after gaining the storytellers' perspective, I realized that the dilemma was not really about the customer's need, rather it was about the fieldworkers' inability to respond as an expert. The perspective from the teller had revealed an unspoken norm that defined the expectations of the fieldworker: be the expert and experts have answers. Digging deeper into the story and storyteller data helped me realize that the fieldworker either lacked information or expertise for dealing with the issue or problem presented. In some stories, e.g. Madagascar, the fieldworker's expertise was under challenge. Lacking information may not have been as critical if the fieldworker were willing to turn to the newly established information help desks for gathering information. Lacking expertise, though, may have been more of a problem for the fieldworker.

There came a point when phenomenon began to emerge regarding what was going on in the story. The storytellers revealed that it was unacceptable to not have the answers if you were the resident expert in a given country. Nor was it acceptable to let your colleagues know that you didn't know. The story on the other hand described situations where the fieldworker's expertise was in question and despite the norm, s/he quickly turns to others to ask for guidance. The story was asking the listener to change a traditional practice, explicitly stated in the story, and ignore the unspoken norm that says they must always be the expert. I believed that the fieldworker was in a position where s/he had to choose to break the rules. Rules in this situation are synonymous with organizational norms, for which there were two. One norm was that it wasn't okay to let others know that you didn't have the answer. The other norm was to make every unknown answer an important official activity—return to headquarters, commission a study, write a report and return the official position of the organization to the requesting customer within a period of 1 to 6 months.

The data sets were validated by comparing data with the initial codes and with the guidance and expertise of my colleagues. Axial coding allowed me to return to the data sets and ask questions about the phenomenon. Questions I asked: 1) what conditions led to breaking the rules? 2) what are the specific properties for breaking the rules? 3) what actions occurred when breaking the rules? and, 4) what were the consequences when breaking the rules?

At this point, the selective coding allowed me to integrate the data and begin to develop concepts. Each category within the story took on different meaning than what was found during the initial analysis. Each story contained four categories with sub-categories. The category, event, contained the sub-categories: relevant, true and known. The category, dilemma, contained the sub-categories lack information, lack expertise and challenge expertise. The dilemma also created tension for the fieldworker. The category, break with the traditional practice, had sub-categories, asking for help and ignoring the underlying norm—it wasn't okay to let others know that you didn't have the answer. The last two categories were outcome and consequences. Outcome contained the sub-category, benefits. Under the sub-category of benefit were responses and time. The responses provided the information or expertise needed and in a short period of time. The tellers' perspective brought in another sub-category under outcomes, vulnerabilities. The tellers data revealed the potential vulnerabilities for breaking with the norm and traditional practice. The category, consequences, had two sub-categories, satisfaction and concerns.

Satisfaction was explicit in the service or product provided. Concerns emerged from the tellers' perspective.

After rigorous coding, I shared my data with my colleagues to get feedback on my coding and interpretations. I also looked for comparisons between what my data revealed and what was stated in the literature. My colleagues, also students in the Adult Learning and Counseling doctoral programs, and I met weekly to review each of our data sets. My colleagues appropriately challenged, questioned and probed the meaning of the data. In addition to my colleagues, three of my committee members evaluated and challenged my data findings and interpretations.

### Summary

This section introduced how I set up the study, gathered the elements to study, and collected and analyzed the data. Given information on the organization's context and discussions with my colleagues and professors, the analysis of the data are plausible. However, the limitations of plausibility are constrained by minimal access to organizational information and by obtaining only six storytellers' perspectives.

The next chapter will reveal the findings of this study and the themes and patterns discovered in more depth.

#### CHAPTER 4: RESULTS

And stories need an idea about human encounters, assumptions about whether protagonists understand each other, preconceptions about normative standards.

(Bruner, 1990)

### Introduction

This chapter deduces meaning from the accumulated data gathered from the written stories, the oral stories and from the storytellers' perspective. To best understand how the findings were derived, this chapter reviews the intent of the Knowledge Management initiative, explains the role of the story during that initiative and reveals how concepts emerged from the story and the storyteller's interviews. Story as an approach for supporting innovation through shared experiences is further discussed in Chapter 5. Although the argument is not conclusive and should be further pursued in future research, it presents a good first step toward a more in-depth understanding of the use of story and storytelling.

The findings discussed in this chapter are presented in five sections. In the review of the knowledge management initiative, I present a brief history of the organization's effort to introduce knowledge management. The next section, The Intent of Story, provides information related to the role of story during the initiative. Section three, Storytellers' Perspective, provides additional insights into the intended role of story. Additional story concepts emerge as results of the storytellers' interviews are analyzed. This section also presents how the stories were selected, how the story criteria surfaced and how the audience responded. The next section offers a comparison of the written and oral stories with a discussion on the shortcomings gleaned from the interviews. In the last section, I summarize the findings and how they relate to the research questions.

### Knowledge Management Initiative

The business focus of the organization examined is to provide financial assistance as well as expertise in the form of knowledge and information resources to struggling countries around the world. All forms of support are meant to improve economic conditions in order to promote development, improve a country's standard of living and reduce the level of poverty within that nation (Fulmer, 2000).

This member owned and operated organization struggled through two reorganizations as it strived to remain competitive in the evolving financial market. To remain competitive and cognizant of its customers immediate needs, it initially dedicated its resources in the mid-nineteen seventies to fund urban poor initiatives (Fulmer, 2000). However, a late eighties reorganization cut dedicated budgets, minimizing all program support for the initiatives.

Personnel were cut or dispersed. Important issues that had emerged out of this initiative were lost. No longer were the new staff interested in providing any assistance beyond research. A second reorganization in 1996 began to pull the previously diminished initiatives from the decade before back into focus. Once dispersed and autonomously run departments were now consolidated. The organization's new structure operated with six vertical geographical regions and five cross-cutting networks, all led by the same vice-presidents. Directors managed the three to four sectors within the five networks. The nineties realignment was meant to once again improve its competitiveness within the world financial market.

During the later reorganization, the organization's president wanted to improve how the organization conducted business with its world customers and partners, thereby deciding that the organization should position itself as a knowledge resource in areas specific to economics and infrastructure development expertise (Fulmer, 2000). The president wanted to share the organization's depth and wealth of knowledge with all those affiliated with the organization.

To effectively promote a Knowledge Management (KM) initiative to all staff, the organization had to streamline business processes. The kick-off and subsequent presentations of this initiative were not well received. The director of the KM initiative and the staff facilitating these presentations were attempting to find a way to help the rest of the staff understand the value of this KM initiative and to convince them that it should not be taken as just another passing fad. The director was particularly concerned since his job was on the line.

Apparently there had been many previous attempts to introduce knowledge management that had failed. Since the staff saw this latest initiative as another fad, they believed that if they sat tight long enough it would go away. Getting involved in sharing knowledge was perceived as one more task to staff's already full workload (Fulmer, 2000). Normative practices had been established and followed throughout the many years of this organization's existence. Asking for information from a colleague could produce unresolved issues. One issue was that staff who had worked in the field within one of the dispersed, autonomous offices were considered experts in their field. If the field representative did not have the answer, he or she conducted a formal study with headquarters staff to appropriately research and write the response in an official organization sanctioned report, thereby maintaining their expert status. Secondly, some colleagues chose not to respond to request. This may have been from work overload or from lack of knowledge. The director claimed, "People don't admit ignorance, or answer, if they

don't know the people in the community" (Fulmer, 2000 p.7). Staff who did respond often sent reams of information, making it difficult to sort through quickly. Another issue was information reliability. Some staff became resentful of others checking the reliability of the information they share. If they were the expert, why would you want to check with others as to its reliability?

The organizational culture was defined as closed and steadfast. It has always been somewhat militaristic and hierarchical (Fulmer, 2000). One staff member claimed that the majority of workers were very dedicated, committed and quite introverted. Another claimed that staff were arrogant and tolerated little to no alternative to their own opinions. For whatever reason, staff were generally very reticent to embrace new ideas or initiatives or to share information with those outside their circle of peers. The previous reorganizations may have created an environment of reticence, stemming from fear of losing one's job or the fear of losing status. Up until the consolidation during the eighties, the fieldworker maintained an autonomous expert status in the field, potentially creating a sense of superiority. This contextual information will emerge in the data analysis. This information contributes and could become part of the conceptual issue in the analysis.

The director had to find a way to demonstrate how practicing knowledge management would benefit the staff. The director had several colleagues from the different sectors helping him present the KM framework. Each colleague presented in a format that described and defined knowledge management and what needed to be done to effectively share knowledge.

Initially, the director and his colleagues' presentation format was very logical and pragmatic. The presentation opened with why knowledge management was needed within the organization and proceeded to take the listeners through a series of slides explaining the logic of how the new system work. This presentation style, according to the tellers, generated little discussion, a lot of resistance and no questions or comments of interest.

The arduous presentations finally took a positive turn when the director of the initiative serendipitously repeated a story that he had heard during lunch with a friend. For the first time, the audience seemed engaged and asked several questions. The story excerpted below was about how a worker in a remote location in Zambia had found information through the Internet.

Thus, in June 1995, a health worker in Kamana, Zambia logged on to the Center for Disease Control website and got the answer to a question on how to treat malaria. This story happened not in June 2015, but in June 1995. This is not a rich country; it is Zambia, one of the least developed countries in the world. It is not even the capital of the

country; it is six hundred kilometers away. But the most striking aspect of the picture is this: our organization isn't in it. Our organization doesn't have its know-how and expertise organized in such a way that someone like the health worker in Zambia can have access to it. (Denning, 2001b)

The presenter perceived that the listeners were identifying with the event: worldwide remote location and the need for critical information. The story identified the event by stating a time period and location. If the health worker had not been able to ascertain the information needed, he or she would have experienced a dilemma. The conditions "not a rich country" and "least developed" tell the listener of the possible dilemma. Normally, this location would not have had the computer or the Internet connectivity available to the health services worker. This story states how the outcome in this situation is positive. It also states how the listeners' own organization was not part of this effort and, consequently, was falling short in providing assistance to its clients worldwide. The point in this story was to challenge the organization to start developing strategies that would help its clients around the world to quickly gain access to information and knowledge. Although this large multinational organization was a financial organization, not a knowledge sharing organization, the story, according to the tellers, somehow sparked interest in the listeners during early presentations.

The director thought that his organization might have a few stories demonstrating how clients quickly ascertained information or knowledge from its own experts. The initiative had included the start of an advisory service within one of the major education divisions where workers from all areas could call and ask for library/resource help or connection to another expert in the field. Although not many personnel were using the service, there were a few. The director decided to investigate to see if there was enough information to create a story that was 1) relevant to the organization's work, 2) enough to piece into a story and 3) made a connection to what he was attempting to promote. He found bits of information that indicated that there were efforts already underway that deviated from the organizational practice and demonstrated the benefits of knowledge management. However, he needed to demonstrate how the organization would benefit if everyone were willing to share their expertise, information and knowledge with each other.

Initially, only one or two stories were found, developed and shared. The telling of one story led a listener to share about another division's efforts within a circle of colleagues. The

director kept telling the stories he created. When he presented without a co-presenter, he would drop the PowerPoint show and resort to just sharing the story. The team perceived that he was successful in getting the audience engaged and interested. The team members, one by one, abandoned their logical and pragmatic presentations and began to create and share stories during their presentations. As the team continued to tell the stories in the KM presentations, they perceived that the staff were gradually changing the way they did business and momentum was growing within the organization. The tellers imagined that it might have something to do with the stories.

According to the tellers, the story precipitated listeners to ask questions and make comments about how they could get knowledge management to work for their divisions. The president of the organization even heard one of the stories and began to share it as his own. The director and his team coined the stories “springboard stories” because they believed the brief stories allowed listeners to create their own story while listening to the one shared, enabling them to see how the knowledge management effort could work for them.

After the initiative was well underway, the director wrote a book about his experience. He claimed that the stories provided a framework of just the right amount of information that mentally catapulted the listener to consider his/her own solution for change (Denning, 2001b). The director described the necessary elements of story as true, brief, intelligible to a specific audience, having an identifiable character that is representative of the core business, be a known character or organization, be interesting, enable the listener to make a mental leap, have a happy ending and contain a change message that is covert (Denning, 2001b, p.197-199). The director’s determination was based on his experience of trial and error.

This study examines these stories in an attempt to understand how they operated in the KM initiative. Several themes emerged during the study. In the first section, five themes found prevalent in the stories are described: event, dilemma, normative practice, a break with the normative practice and outcome. The storytellers’ interviews revealed additional themes: underlying norm, challenging the norm and consequence(s). The remainder of the chapter discusses the themes of story selection and creation, and audience responses: tension and consequence(s).

Although this study does not examine the organizational values, a thread of the value system is revealed through a traditional business practice highlighted in the story and an

underlying norm brought out in the storytellers' interviews. The normative practice is important to the discussion, since it is the focus of the initiative. Organizational personnel had to let go of the no longer useful traditional business practice, which would enable them to be more efficient in delivering clients what they needed. The underlying norm governed fieldworkers to not admit ignorance. They were the perceived experts, therefore were supposed have the expertise and the knowledge needed to help the client. Although, we don't really know this without further investigation, it is possible that this attitude or adherence to the social norm impeded the acceptance of the initiative. We do know that the tellers perceived that the stories were instrumental in a third of the organizational population accepting the initiative. We also know that the stories told portrayed the organization's innovators finding ways to better serve the customers.

To fully understand the culture and values of this organization requires further examination of the organization's value system, which this study did not cover. However, the glimpse into the values revealed by the storytellers' perspective in this study do impact the analyses of the stories. The values minimally gleaned in this study beg the question, why were organizational norms revealed to be so powerful?

#### The Intent of Story

The goal of using story was to encourage the organizational staff to abandon the long held normative practice of being an expert and to begin to form a new practice of being able to locate expertise or needed knowledge. The long held tradition was to represent the organization as the expert and, if you were in a position where you did not know the answer or needed additional knowledge, you were to conduct a formal study. The new practice enabled you to belong to a community of scholars, share your knowledge and allow them to share their knowledge with you. The story did a good job of mentioning the normative practice and how it had to be changed. However, the story did not discuss the impact of other concerns—that it was unacceptable to admit ignorance and that the period of the knowledge management roll out was amidst the mid-nineties reorganization. These latter issues will be discussed in the fourth section of this chapter, Storytellers' Perspective.

Although a number of stories were created to convey the need for adopting the new practice, this study only examined the most commonly used stories shared during the

presentations. Those examined were the only ones that were written and distributed through the Knowledge Management website. The web stories were entitled Yemen, Zambia, Chili, Central Africa, Pakistan and Madagascar. Each story portrayed the core business, mission fieldwork. Most organizational staff either had been involved in fieldwork sometime in their career or were very familiar with the nature of the work. The story topic covered known fieldwork activities at the time the story was created. Topics of the stories examined were administering taxes, repairing highways, privatizing utilities, dealing with schoolteacher demands, organizing mayoral elections and building an educational information system.

The key themes that emerged from the stories were event, dilemma, normative practice, a break with practice and outcome. The event relates to the fieldwork that represents the core business. The dilemma is the fieldworker's inability to answer a request or question. The normative practice is the existing organizational practice that a fieldworker must use to manage answering questions or requests from clients in the field for which the fieldworker has little or no knowledge basis. The story explicitly states what the normative practice is if an answer cannot be provided immediately: the fieldworker is expected to state that s/he must consider the request, wait until s/he returns to the headquarters location to commission a study and return with an official answer or comment within one to six months. The break with normative practice is depicted by the fieldworker taking action that is different from the normative practice. This is demonstrated by the fieldworker asking for help and receiving responses. The benefit is that the fieldworker receives information, guidance and expertise in a remarkably short turn around time. The intent of the story was to make the listener want to abandon the traditional practice and create a new and more efficient practice. The new and more efficient practice was knowledge management.

#### Event

Stories usually begin with an introduction that places the listener into a known environment or allows the listener to mentally imagine a period of time (Bettleheim, 1975). In this study, the stories bring out a specific period and place. Each is an authentic event that occurred to one or more specific staff members that were working in a remote location away from the headquarters of this organization:

A leader of one of the multi-disciplinary task teams was in Santiago, Chile. (Appendix B)

In July 1997, our organization had a task team in Yemen, a country in the Middle East and one of the poorest countries in the world. (Appendix C)

On December 15, 1997, a task manager in the Central African Republic... (Appendix D)

In March 1998, the Government of Zambia had announced that it was planning to introduce elections for the mayors of its cities. (Appendix E)

In August 1998, the government of Pakistan asked our field office in Pakistan for help in the highway sector. (Appendix F)

Near the end of 1998, the team leader had a problem. He was heading a group...staff in Tananarive, the capital of the African island of Madagascar, in a comprehensive review of the country's public expenditures. (Appendix G)

### Dilemma

Immediately after the introduction of a specific time and, in some cases, to a specific place, the stories attempt to depict the usual dilemma faced by many field workers when in a remote location. The stories state how the field worker is asked to provide an answer to something they know either little or nothing about:

As it happened, she didn't have the full answer to the question on hand. (Appendix B)

As it happened, the members of the task team didn't happen to have this particular expertise... (Appendix C)

As it happened, he didn't know what had been done in similar issues in other countries. (Appendix D)

They wanted to try a different technology, a technology that we have not supported or recommended in the past. And they wanted our advise within a few days. (Appendix F)

The team leader found himself at the center of a mounting controversy over introducing a value-added tax ...He was therefore inclined to side with those arguing against the exemption, but as the controversy gathered momentum he could also see that the debate could jeopardize the success of the entire public expenditure review. (Appendix G)

...a group of our colleagues was in a country and they were faced with an issue while they were negotiating over some value added tax and whether it should be applied to medicines or not. The instinct of the team and the team leader was that they should not be exempt. The government wanted this to be exempt. (Appendix G)

In each case, the fieldworker was on the spot to provide an answer. He or she lacked the needed information or expertise or his expertise was challenged. The worker was in a position to have to decide how to provide the answer. The normative practice was to commission a study and get an official answer back to the client. This usual practice took one to six months.

### Normative Practice

The normative practice was evident in the written and oral stories shared to promote this initiative. The most frequently told stories state the practice. The following are story excerpts explicitly stating the traditional way of doing business when getting answers for the clients:

What usually happened in past situations was that the team leader would try to persuade the review participants of the wisdom of his viewpoint and, failing persuasion, would return to ...headquarters ..., to consult with colleagues and supervisors. He would eventually give the other participants the ...official "position," in the hope that this would resolve the controversy. Often such official "positions" merely set off further controversy, which could last for months or even years, undermining the spirit of collaboration essential to public expenditure management. (Appendix G: Written Story)

In the old days, you normally would say, "Well, Mr. Minister, we really don't know about that. Let me get back to you." We'd come back and, three weeks later -- we'd research it and so on and so forth, and send a fax or letter or whatever. And it just added to the time to lessen the impact of whatever you're trying to do. (Appendix G: Oral Story 1)

Typically, in the older days, we would say, okay, we will go back to headquarters and consult and get back to you. (Appendix G: Oral Story 2)

...fair to say that in the past we would not have been able to respond to this kind of question within this time frame. We would have either said we couldn't help, or have said to them that this technology is not one that we recommend or we might have proposed to send a team to Pakistan. The team would look around, write a report, review the report, redraft the report, send the report to the government, and eventually, perhaps three, six, nine months later, provide a response. (Appendix F: Written Story)

And the ...Task Manager who is a highway expert in the past would have said “well I have to find out about this new technology, I'll have to do some research, I'll go back to Washington, I'll commission a study and it takes three or six months before we will send you the report.” (Appendix F: Oral Story 1)

Again, the task manager had some ideas but really couldn't give an answer. The typical answer would have been, in the old days -- it would have taken such-and-such time to get an answer to the guy. (Appendix F: Oral Story 2)

The task team would have told the client that they would get it to him, and then would have gone on to another country, in this case Jordan. Eventually, the team would have to go back to Washington and –let’s assume they remembered—would have searched for and found the answer, and dispatched it to Yemen. The answer would have got there within weeks, rather than days, and the team would not have been present to discuss it with the client. (Appendix C)

In the past, what would have occurred is that the task manager would have promised to get back to the Government once he returned to Washington and could research the issue. (Appendix D)

In all of these situations, the story addressed the traditional normative practice. There was no doubt that the fieldworkers were expected to follow the usual practice.

### A Break with Practice

The field workers in these stories decided not to follow the normative practice. The stories do not address how the field worker makes this determination. The stories only state how the fieldworker goes against the normative practice by electing to do something different. Interestingly, the option chosen by the fieldworker in each story is to contact their community of scholars or the advisory service:

So she contacted the advisory service of the education network who was able to assemble for her experiences from other staff working in other countries around the world that were analogous to the situation of Chile. (Appendix B)

So they contacted the staff of the help desk of the education sector, who were in touch with the relevant community of practice. (Appendix C)

...he was able to contact the community of practice in the network by email and asked for urgent help. In Washington, D.C., the leader of the community of practice was able to provide him by email with similar Kenyan experience in the telecommunication industry. (Appendix D)

The task team leader in our field office in Pakistan sent an email and contacted the community of highway experts inside and outside our organization (a community that has been put together over time) and asked for help within forty-eight hours. (Appendix F: Written Story)

But instead of doing that, what he did was send an email to his community of practice what we call a thematic group. (Appendix F: Oral Story 1)

Again, what he did is get on his laptop and send out an e-mail and got an answer from different people, different parts in headquarters, the thematic group leader. (Appendix F: Oral story 2)

### Outcome

The outcome for not following the normative practice in favor of a more innovative approach provided benefits to the fieldworker. The story only reveals those events that turned out positive. The positive benefits were both personal and organizational. By taking a chance with this innovative approach, the fieldworker spent far less time pulling together the information or finding the expertise needed. The organization benefited with saving time and resources. Interestingly each story mentioned specific time savings, described in terms of hours or days.

The material was sent to Santiago electronically and the task team leader was able to synthesize the material and in a matter of hours, the client had the answer (Appendix B)

Same day... Also the same day... Within another day or so...So very quickly within like three days he got the just in time, just the slice of knowledge that he needed to be able to go back to Pakistan and say this is the experience. (Appendix F: Oral Story 1)

As a result, the next day at 10 a.m. back in the Central African Republic, the task manager was able to advise the Government of the Central African Republic on this aspect of privatizing the local phone company. (Appendix D)

So he was able, within days, to go back to the other review participants, lay the international experience on the table, and so resolve the issue. (Appendix G)

Within about 48 hours, there was a number of people who had been consulted and asking whether they could find some good examples of –(Appendix H: Oral Story)

So he had, like, eight or nine answers to his question in, like, 24 hours ... (Appendix G: Oral Story 1)

No longer would its fieldworker have to stall the client by having them wait for weeks or months for an answer. Nor would the organization have to expend additional human resources on researching the effort. Time was the significant personal benefit for the fieldworker and likely the reason for the fieldworker becoming the innovator for adopting the new practice.

The stories selected were actual events that had occurred or had been ongoing issues at the time they were developed. The intent was to demonstrate that this action happened somewhere within the listener's organization, in one of the known field offices, by a respected and knowledgeable colleague and during a known mission.

### Storytellers' Perspective

Although the goal of using story was to encourage the organizational staff to abandon the long held normative practice and begin to form a new practice, other concerns emerged that may have impacted whether a listener chose to abandon the practice or not. The previous section mentioned that the long held practice was to represent the organization as the expert and, if you did not know the answer or needed additional knowledge, you were to conduct a formal study. To abandon this practice you needed to develop a community of like minded scholars, share your knowledge with them and allow them to share their knowledge with you. Tellers expected the stories to challenge the staff to change how they sought out information and knowledge, and to be equally willing to share information and knowledge.

The storyteller interviews revealed relevant themes that may have worked against the intent of the story and goal of the organization. In this section, the themes brought out are the underlying norm, challenging the norm and the consequence(s) for challenging the norm. Exposing the underlying norm revealed how field workers were expected be experts in their field and that it was unacceptable to not know an answer. Even though their colleagues knew that everyone would encounter a time where they could not possibly know every answer, this particular period was a more vulnerable time. The organization was going through a large reorganization. To admit that you did not know all may have jeopardized your job security. And, while the stories revealed only positive consequences, there were negative consequences to abandoning the normative practice, ignoring the underlying norm and not being cognizant of the ongoing reorganization.

### Expose the Norm

The storytellers identified the underlying norm and evidence that the organization was undergoing reorganization. They discussed how difficult it was for the field worker to admit that s/he did not know all when in the field in a client country.

...here you are faced with a Minister who wants an answer and you're there representing the bank. You're supposed to know, we're hired because we know we're the subject matter experts. And all of a sudden here comes something that isn't something that we've dealt with in the past. The organization is downsizing so looking for people to get rid of, and now you're going to say, I don't know the answer to that question, you're not going to say that. (Appendix I: 263-277)

...in the past, it was not acceptable to say that you don't know something.... It really wasn't. It was just a paradigm. (Appendix K: 294-297)

I told her the story of our experience in the bank, which had been that—in fact, we found that was true in the beginning: knowledge is power, and some people refused to share what they knew because if you wanted it you had to pay for it. They thought their job was at risk. (Appendix K 3: 907-914)

'I'm a big shot in the ...organization, supposedly the expert in the field. But here I am, saying I don't know.' Here I am, asking for advice about something I should know. And it's something that's quite risky in an organization that's downsizing, unless he knows who he's sending it to. And he knows who he's sending it to because these people have met, they're a community. (Appendix N: 388-399)

### Challenge the Norm

The stories were used in an attempt to get all staff to become willing to engage in a new practice, yet the forces that oppose this activity are evident in the organizational climate. The opposing forces were not addressed in the stories. The storytellers believed that if they continued to share only the positive results from the changed practice that everyone would engage and participate:

Um, so basically people would then begin to understand, I mean that's what we were really aiming at, that the people would understand what we were talking about and that it wouldn't seem so foreign. And I think that the questions and comments showed that they were actually um, realizing that I can share my knowledge with you, I don't have to learn a new technology, I don't have to go and do something else that's different. (Appendix I: 135-146)

Early on, managers were generally opposed to changing practices. Despite the risk of turning off the managers, the storytellers intended for their stories to provide a message beyond

the situation presented, a message that somehow would give the listener some insight into how to change their way of doing business.

You know, when you are implementing a program and people are highly skeptical, which was the case back in those years, and folks were really against us—having some stories coming from the ranks of the education professionals themselves, was pretty powerful for alerting them that something was happening. (Appendix J: 303-312)

I guess the reason why we started to use them is because they were success stories, in a sense. There were specific instances where, because of having a network of professional organizing communities and organizing with the Education Advisory, services were able to answer questions or to connect people much more quickly...we were pretty happy about having the evidence that something was happening. (Appendix J: 279-295)

The underlying message is that we have to change the way we're doing business—that's a pretty big message—and not through a formal reengineering, but in the way we do things. (Appendix K: 973-978)

...tell how the task manager was under pressure, was under the gun, there was something they didn't know, all his members of his team really didn't know how to handle this issue, what had been done, what had been the results, you immediately have the empathy of your audience. They know exactly what you are talking about: to be under that pressure, to not know the answer. They're then perhaps readier for your proposed solution. (Appendix K: 422-437)

The storytellers believed that everyone who had been in the fieldworkers' position knew the pressure of being in a remote location and in a difficult situation where help was needed. This underlying message was meant to counter the underlying norm that it was unacceptable to not know the answer.

Then, in between the lines, would be the message, Well, why don't you do it. If you don't believe this, okay. Ask questions. If you want to corroborate, now you know this face. You know the name. You know the situation. Go and find out. And if you're satisfied that this is true, how are you going to deal with the message that was there in terms of engaging you? (Appendix L: 171-180)

So these were sort of the sub-themes that were running between the text of the story. It was implicit. It was sort of a modeling that type of behavior. This was a real person. It was a senior person with a lot of experience who could have relied on first instincts or what was between his own ears. Well that was not as powerful as what is between the ears of 25 other people. So it gets the message across that no matter how well you know that subject, you might learn. But you have to reach out. (Appendix L: 599-613)

...the essence of the story packaged in such a way that, while it was interesting to listen to, it also brought home hidden messages in between. Because, if we wanted to use that

story to change people's way of doing business, that story had to have content, that story had to have the actual case or a practice or an event that would end up with an outcome or a result that was not just so-so, but very shocking sometimes; shocking in the sense of, oh my gosh, I can't believe that this could be done....A certain small innovation could mean differences in the lives of people that we were dealing with. (Appendix L: 137-163)

The explicit message for not choosing the normative practice is evident. What was not as obvious was that it was okay to ask for help to deal with the situation. This underlying message, according to the tellers, was embedded in the language shared by the tellers and in the minds of the staff listening.

The tellers say that they intended for the evidence in the story to be far reaching, change the way that business was done, show a small innovation and open the listeners to new possibilities.

Well it was high profile. It was far-reaching. It was timely. It was provided within the time that the person needed. It required a lot of legwork that would have been difficult for an individual to have done. (Appendix M: 1298-1302)

For the new practice to be accepted meant that the field workers had to break with the normative practice and believe that it was acceptable to ask for help, even in a time where jobs were in jeopardy. The role of the fieldworkers' managers and whether those managers encouraged their workers to look for strategies that would solve the unusual situations faced in the field is unknown.

### Consequences

The positive outcome described in the stories should have encouraged everyone to discard the old practices and ignore the underlying norm. The goal of telling the stories was to show that not managing knowledge potentially left the field worker in a situation that could cause him/her to fail when faced with an immediate request from the client.

...if you explain that the task team leader was under a lot of pressure and that he really needed to get this done....under the gun, there was something they didn't know, all his members of his team really didn't know how to handle this issue, what had been done, what had been the results... (Appendix K: 275-278, 424-428)

However, the storytellers revealed the potential for underlying negative consequences. Listeners had to consider if their changed actions would cost them their job or diminish their status in the eyes of their colleagues. Within the consequences were opposing conflicts:

reluctance to change, just another fad and job security. These conflicts confounded the need for organizational members to abandon the normative practices.

And, of course, this was just the beginning of the war because a lot of the managers were—traditional managers were totally opposed to it. (Appendix N: 88-91)

You know, when you are implementing a program and people are highly skeptical, which was the case back in those years, and folks were really against us—having some stories coming from the ranks of the education professionals themselves, was pretty powerful for alerting them that something was happening. (Appendix J: 303-312)

... that was interesting because he was my boss, before, and I knew he was always a bit reluctant to innovation and so forth. (Appendix J: 976-979)

The tellers knew that these opposing consequences were on the minds of their audiences. With their awareness they could mentally prepare for what they might encounter in their presentation sessions. Early in the initiative, the audiences made the presentations difficult.

Is it a converted audience or not? Are you trying to change behaviors?... Converted to a way of doing business. ... So are they going to be hostile? Are they going to be perfectionists? The nature of the audience is very important. (Appendix L: 681-691)

...I understood because it would take people away from thinking about what they perceive as negative things about his whole thing about knowledge management: a) that it was a fad—it was the latest fad by the management, b) that it was about technology, c) that it was pushed by management from the top. There were a lot of antibodies about knowledge management at that time. (Appendix J: 813-823)

Not only were staff members being asked to abandon normative practices during a period of downsizing, they were afraid for their own jobs. As was other staff throughout the organization, the director of the Knowledge Management initiative was even concerned about his job security.

It took them a couple of years to do it. I was just one of the first people. It was nothing personal, as it turned out. And most of the people just left. But I wasn't quite ready to leave, so I stuck around. I was a desperate man. I'm ready to try anything.... So they told me to go and look into information. (Appendix N: 55-63; 12-13)

The organization is downsizing so looking for people to get rid of, and now you're going to say, I don't know the answer to that question, you're not going to say that. (Appendix I: 271-277)

...knowledge is power, and some people refused to share what they knew because if you wanted it you had to pay for it. They thought their job was at risk. (Appendix K: 910-914)

'I'm a big shot in the ...organization, supposedly the expert in the field. But here I am, saying I don't know.' Here I am, asking for advice about something I should know. And it's something that's quite risky in an organization that's downsizing, unless he knows who he's sending it to. (Appendix N: 388-397)

### Story Selection and Creation

The goal of story in this initiative was to encourage the organizational staff to abandon the long held normative practice and begin to form a new practice. The tellers knew that for the story to convey this message it needed to be something that would capture the attention of the staff. One teller who created a number of stories had found through trial and error that a specific pattern worked best. When one looked promising, certain elements were pulled out of the story and applied against a template he created. He shared this template with other tellers on his team. Tellers discussed how they found and selected the stories and designed them against the template. The frequently shared stories that were designed against the template were Yemen, Zambia, Chili, Central Africa, Pakistan and Madagascar.

The key themes that emerged in analyzing story selection and creation were: the story search, story elements and perceived audience responses. In the search for a story, the tellers acknowledged that finding the "right" story took time. Attention to the fieldworker's credibility and whether the situation was high profile were essential to the teller's search. The story elements had to include relevance to the core business. It needed to be about something that everyone in the organization was familiar. The tellers claimed that every story had to end with a success. They believed that a negative ending was not productive.

### The Story Search

For most of the tellers, finding stories was not an easy task. Tellers claimed that finding good stories took a great deal of dedicated time and that it took even longer to put all the pieces together.

The stories don't come to you naturally. It's like best practices. You can send an e-mail and say to people, we would like to have some good practices, and you know most of the time of course you are not going to get anything. (Appendix J: 1030-1036)

So that these stories quote-unquote, don't just arrive full-blown out of nowhere. (Appendix M: 236-238)

To find the entire story required pulling pieces together from many sources. Tellers stated that talking to others early in the initiative and pulling questions from the advisory service were their primary sources for beginning the search. “They” in the first example is about the Advisory Service. The organization had an advisory service for specific groups: education, poverty, finance and so on. The advisory service was the help desk for connecting information and people. Part of the Knowledge Management initiative was to get the employees, particularly those in the field, to use the Advisory Services. It was from the Advisory Services that the tellers were able to piece together some of the stories.

They had a tracking system, so they knew exactly the type of question which was coming. They knew, also—they were tracking the various answers—coming into a question, coming from different people within the networks or within the communities of practice. So they had actually a record of all of the ... which would come along with a specific question. (Appendix J: 317-327)

But, in order to, again, get people on to using a service—to be able to do that, there’s a lot of marketing involved and a lot of connections. And, although we had, let’s say—certainly, at the very beginning, we had a sort of very...relentless communication. But people didn’t, still, necessarily get it. Why would they come there? Why would they ask either an advisory service or a thematic group for help? What would make them want to do this? (Appendix M: 293-307)

If the tellers heard something that sounded worth pursuing, they would dig for more information. The tellers actively sought out what they deemed “successes” as a way of showing evidence that some employees were not following the traditional normative practice when they needed information fast and were benefiting from the change. One teller who began searching the database for these incidences found a few examples. From his findings, he began to build a few stories.

Tellers revealed how they selected the pieces of the stories based on something different happening. One teller talked about what the story needed to depict a paradigm change.

...can help solve problems: we can do things quicker, better, faster, cheaper, if you use knowledge management. That’s the message that we’re trying to get across as to why you want to be doing this...I think what we were looking for was a story that showed the different parts of knowledge management and the benefits of it...The underlying message is that we have to change the way we’re doing business—that’s a pretty big message—and not through a formal reengineering, but in the way we do things. (Appendix K: 523-532, 542-546,973-978)

The teller knew of a sector within the organization that had been doing business differently. They were the first group to have used the communities of practice to network when in a bind.

Typically, what you initially find is something that doesn't look very promising, something that is only a fragment of the eventual story. The Pakistan story, for instance, when I first saw it, it was somebody had gotten some advice from Jordan. They were in Pakistan and they'd gotten some advice from Jordan. That was all. So I said, well, that will never do, and not very interesting. So I threw it away. And when I'd thrown everything away and I had to make my presentation, I got back to the reject pile and went through it again and said, Well, does anything else happen in this? Oh, yes, there was somebody in Argentina. Oh, yes, there was the guy in South Africa. Oh, yes, New Zealand chipped in. (Appendix N: 619-640)

Other tellers state that it was the Roads and Highway sector, initially reluctant to discuss their experience, that was the first to ask each other for help and break with the traditional practice. They had been operating within their own paradigm, separate from the rest of the organizational culture.

The Roads and Highways were the first group that we found who initially weren't keen on joining the whole knowledge movement because they were a very established group. Um, had distribution lists, they had a website, they had external partners, and we kept saying but you're a living proof of what we want to do, we want everybody to work this way. So we worked with them and that's how we got that one story. (Appendix J: 288-299)

Following the development and sharing of the Roads and Highways story, the sector's once quiet operation of traditional norm breaking was now public to the rest of the organization as an example of how to break with tradition and be successful. One teller claimed that while sharing the Roads and Highways story, another sector claimed to already have a similar operation.

We started to tell it and then somebody would say well you know we did something like that in tax in Madagascar (Appendix I: 299-302).

Searching for the stories took patience and the ability to look for the unexpected. The tellers did find the unexpected and put together the pieces found to form the story.

### The Story Elements

Key points for finding the "right" stories were considered. Other elements emerged as important to shaping the story, too. The essential elements were: event, dilemma, a break with

tradition and the consequence(s). The stories had to be unique to the organization's core business before anyone would pay attention to them. The story needed to show how the fieldworker was able to deal with the dilemma that had him/her dealing with opposing consequences: breaking with tradition or keeping one's job. The outcome represented the consequence.

The event seemed to be an important element. The stories had to reflect the business and/or the business activities.

...they were real life stories of people in the field dealing with the client who needed a quick answer to a problem. (Appendix I: 225-228)

So perhaps, this task manager—as we call them here—or project manager would have been on mission there, and probably for a week. So there would be enough time to go over that with the ministry officials. So the rapidity with which these things were attended to or are attended to is also something that seems to make quite a difference, as well as, obviously, quality. (Appendix M: 462-472)

...someone who's in a far-away place, out-of-the-way place in the world and who's desperate to get the answer to a question on some esoteric, complicated topic is such a familiar and central part of the work of the ... that, when you tell a story about that, everybody is immediately resonating, saying, "I know that. I've been there. I've done that. That's me." (Appendix N: 716-725)

Because, if we wanted to use that story to change people's way of doing business, that story had to have content, that story had to have the actual case or a practice or an event that would end up with an outcome or a result that was not just so-so, but very shocking sometimes; shocking in the sense of—oh my gosh, I can't believe that this could be done—or –wow, I never would have expected something to produce such great results. (Appendix L: 142-153)

The right story event had a credible fieldworker and high profile situation that was well known. These elements were to add credibility to the outcome.

...we were looking for satisfactory resolutions, success of the story, so that we were able to—I guess we may also have been looking for the credibility of the staff involved in that intervention. In other words, if it is a staff who is pretty well-known by the community and so forth, that's even better because he or she is pretty representative of that network of staff. So all of that may have been factors in trying to identify the right stories. But it was not very difficult to identify. They would literally jump at you. You would know that. (Appendix J: 399-415)

Well it was high profile. It was far-reaching. It was timely. It was provided within the time that the person needed. It required a lot of legwork that would have been difficult for an individual to have done. It required knowing just where to go and get it. And it

also required a lot of sort of TLC. Maybe these other people had priorities, but, because you had a relationship with them, you sort of struck them. You know, I really need this and could you really help me out. It's a package. (Appendix M: 1297-1311)

Selecting a story that had a staff member and a situation known by the community was important. The story was meant to demonstrate the pressure faced by the fieldworker. The listener was meant to hear how to change their way of doing business within a high stress situation. Even though a challenge and risk, the story was meant to encourage the listener to learn from the fieldworkers' actions and consider the success of breaking with the normative practice.

...if you explain that the task team leader was under a lot of pressure and that he really needed to get this done. First, you add that to give it a sort of context and a feel for I, so that people can identify with. Then you draw lessons from it. I find it's a terribly effective way to convey experiences and information. (Appendix K: 275-283)

But used strategically, it can really help in pushing through some sort of a—usually a mental-cultural-social-type of barrier whether its in an organization, whether it's in a smaller group within a team. (Appendix L: 409-414)

So the remarkable aspect of the stories that I told are typically about time and an accelerated schedule, accelerating the process; something that would eventually happen but not in anything like that timeframe. (Appendix N: 1798-1803)

Putting the listener into the position of the fieldworker allowed the listener to be empathetic to the situation, particularly if the listener was or had been a fieldworker. Each story presented the message that the old approach was outdated and the new approach will get the job done more effectively. The frequently used statement in some of the stories, "What actually happened was something quite different", is intentionally stated for the listener to realize that the old rules no longer apply.

The organization is downsizing so looking for people to get rid of, and now you're going to say, I don't know the answer to that question, you're not going to say that. (Appendix I: 271-277)

...knowledge is power, and some people refused to share what they knew because if you wanted it you had to pay for it. They thought their job was at risk. (Appendix K: 910-914)

'I'm a big shot in the ...organization, supposedly the expert in the field. But here I am, saying I don't know.' Here I am, asking for advice about something I should know. And it's something that's quite risky in an organization that's downsizing, unless he knows

who he's sending it to. (Appendix N: 388-397)

The KM director of the initiative believed the stories had to be positive. He felt that negative points or endings would diminish the staff's desire to be enthusiastic about a new way of doing business.

One theory or hypothesis from Euroscience is that what happens when you tell a story with an unhappy ending is -- You have the human brain: the cortex; the mammal brain, underneath; and the reptile brain under (indiscernible). And when something bad happens to you, this mammal-reptile brains sort of kick in and say, "Do something, do something." If you're driving along the highway and not paying much attention and something happens, it's these little gadgets that -- they're not very smart but they're very quick and they cause a lot of commotion and they wake you up and, hopefully, you survive. You pay attention. So, if you tell a story with an unhappy ending about a firm that went bankrupt because they didn't implement knowledge management, then what could be happening is that these mammal-reptile brains are kicking in, saying, "Wake up, do something, something bad has happened" and cause the human brain to intervene and say, "Calm down, reptile brain, you may learn something from this instructing experience." But, after an encounter with the reptile brain, the person is in no shape to move forward with a rapid action, enthusiastic action. But if you're telling a story about "I've got an answer to a question" and resolved it, so the whole organization was much better off, then what could be happening is that that mammal-reptile brain, that limbic system is providing an endogenous opiate reward to the cortex. When things are going well, it injects dopamine into parts of the cortex and creates this warm and floaty feeling -- wonderful, warm, floaty feeling that you've just seen a wonderful movie. Wow. You're reading for anything. You're ready for a new future for yourself, your family, your organization. "Wow. Yeah. I'm ready. Let's do it." (Appendix N:1086-1139)

The intent of the stories was to help the listener understand the message and how that message applied to what it was they were doing within the business environment. The tellers wanted to find the stories that would best convey that message. They also wanted to build a story that would capture the listener's interest from start to finish. The elements that were most shared in the written and oral stories were the event, dilemma, a break with tradition and the consequence(s). During interviews, the tellers revealed other concerns not brought out in the stories. They introduced the underlying norm, which stated the fieldworkers were expected to be the experts and be knowledgeable in the field without having to ask for help. They also revealed how the organization was undergoing reorganization and how the fieldworker was under pressure to effectively handle the situation.

### Perceived Audience Reactions

The use of story is recognized in this organization as being a key means for conveying the message of change. This section looks at what the tellers perceived was happening when the listeners heard the stories. The themes within the audience responses were: something different was happening, body language and verbal cues, follow-ups and audience retelling. The tellers believed that the story generated noticeable responses that no other presentation approach on the KM topic had. Their perceptions were based on experience presenting and telling the stories. More than 10,000 employees over a period of 4 years attended the presentations. The tellers could not always articulate what it was they thought was happening during the presentations.

One teller attempted to articulate how s/he felt the audience resonated with the story, that the audience related to the situation and was drawn in through empathy:

...tell how the task manager was under pressure, was under the gun, there was something they didn't know, all his members of his team really didn't know how to handle this issue, what had been done, what had been the results, you immediately have the empathy of your audience. They know exactly what you are talking about: to be under that pressure, to not know the answer. (Appendix K: 422-432)

### Something Different Was Happening

The storytellers felt that something different happened in presentations when they told the stories. They were unable to specify what it was, but thought that the audience "came alive" when the story was shared.

It's some kind of revelation. It's ah-ha. That's what you guy's are talking about. I'm sure people have expressed that, or this is what I have understood. I cannot tell you whether it has been verbalized as such to me, but I think that's what I understood because it would take people away from thinking about what they perceived as negative things about this whole thing about knowledge management. (Appendix J: 805-817)

The storytellers came to believe that just telling the story was more effective than giving the PowerPoint presentation and telling the story:

I realized that it was just as easy to just tell the story; you didn't need to have the nice PowerPoint—but if you tell a story with some feeling, if you're articulate and so on, you'll find that audiences respond very well to the storytelling as opposed to more formal presentation or reading a paper and that sort of thing. (Appendix K: 162-172)

### Body Language and Verbal Cues

Some recalled the body language and verbal cues after using story. This led them to believe that the listeners understood the point of the story.

So using that kind of a story, people would say oh that's, oh but we do that, and they say oh but we do that all the time, we talk to each other. (Appendix I 100-104)

And you can sense when you are really captivating the attention of people; that people really become very interested. You can also tell when you are losing them. So, when I look back at my presentation, I can see that there is a whole part of the presentation which is theoretical; what is the vision of knowledge management, how is the knowledge management organized, what do we call communities of practice, what kind of technology platform are we using. All of that is pretty theoretical. Then you come to the part where, ... as I said it is a live example of life—or a real example of something which involves the client and which is very close to the real life of task managers or operations—as a presenter, you—very attentive—not losing anybody. People are really into it. You can tell. (Appendix J: 907-929)

You can tell they're excited if there are a lot of hands going up, if you're running past the allotted time and nobody is complaining or saying anything. That's how you know if you're on the right track, if you're using the right approach. (Appendix K: 365-371)

You could feel that you have connected. There was this—wow. And the next day would be—can we know a little bit more about it?—And the follow-up, seeking more information. (Appendix L: 197-201)

...you're reaching and reinforcing your audience, or even if your audience is already asking for things—oh, I didn't think of asking about that. (Appendix M: 903-906)

### Follow-ups

Members of the audience came up to storytellers afterwards, either at the presentation or in their offices, wanting more information. The tellers interpreted the further questioning as a positive understanding of the effort. However, could the questioning of “what context” have revealed a need for more details in the concrete example used in the story?

“The follow-ups would usually want to find out a little bit more: in what context was it done and where can they get some more information.”(Appendix L: 231-234)

### Audience Retelling

On more than one occasion, the tellers heard the stories repeated outside of the presentations. When employees, particularly the president, began to repeat the stories, they believed even more that the employees did get the point of the stories.

“And then you can hear other people in the bank telling them...where somebody else told the Pakistan story and the President got up and said no, that’s wrong. You didn’t tell it right...And, the President got up and told it with passion and that’s the thing, people are passionate about their work.” (Appendix I: 470-487)

The tellers perceived the body language, verbal cues, the follow-ups and retellings as a positive understanding of what the presentation was meant to convey. All of the storytellers were involved in the early stages of the roll out and had experienced presenting the theoretical model of Knowledge Management without the use of stories. Over time, all the tellers decided that using stories was a more effective and engaging approach for explaining the initiative.

### Story Comparisons

The stories were written and told to convince the listeners that they should start to share knowledge with others and go to others to get information when they needed it. The stories presented an event, introduced a dilemma, demonstrated a break with the normative practice and illustrated how internal and external colleagues had ignored the unspoken norm to resolve the dilemma. The stories then presented an outcome based on these conditions and the consequence(s) for the specific conditions of the stories.

The stories by themselves offer only some insight into why they may have been effective in reaching the listener. Because stories are so transparent to the listener, it may not be possible to determine if the use of story was recognized in this effort as a key approach. However, the storytellers felt that something different happened in the sessions in which they shared stories. It was enough of an experienced difference for the tellers to be convinced that the stories were working and, in fact, were a key approach for engaging listeners.

The following table outlines what was learned from the stories and the storytellers. The stories were meant to push the listener to break with the normative practice and ignore the unspoken norm. The table outlines the story elements, potential listener concerns and norms.

The notion of each story is presented and segmented into six categories. The categories read vertically. The elements and concerns are presented for each story. The key categories are event, dilemma, challenge the practice, outcome and consequences. The event places the listener in a known environment with a specific fieldworker. The events are familiar and known by most of the listeners. Each story presents a dilemma. The elements implicitly challenged under

dilemma are the unspoken norm and security. The explicit message about the dilemma is the fieldworker could not answer a question or solve a problem, usually a lack of information or expertise. This is important since the unspoken norm was that it was unacceptable to not know an answer. (See the section Storyteller's Perspective: Expose the Norm.) The other underlying concern was that the organization was going through a downsizing, so to admit that you did not know all would have potentially had an impact on job security. (See the section Storyteller's Perspective: Consequences.) Breaking with the normative practice is an explicit activity in all the stories demonstrating how the fieldworker asked for help. Breaking with the usual practice creates certain outcomes and consequences. By ignoring the normative practice, the worker received the experience or information from others. Another outcome proved to be the benefit of time. The consequence for ignoring the traditional practice was more efficient response to the client, resulting in the client's satisfaction. The consequences for ignoring the underlying concerns and the unspoken norm are not brought out in the stories.

| Story source<br>Appendix    | Story Elements |                        |  |                                 |  |   |
|-----------------------------|----------------|------------------------|--|---------------------------------|--|---|
|                             | Event          | Dilemma                | Break with norm<br><i>Asked for Help</i><br><i>Ignoring norm</i> | Outcome                         |  | Consequences<br><i>Satisfaction or</i><br><i>concerns</i> |
|                             |                |                        |  | <i>Responses</i>                | <i>Benefits or</i><br><i>Vulnerabilities</i> |   |
| Written story<br>Appendix B | Santiago team  | Lack information       | Yes, request   | Assembled info                  | Received information fast                    | Client delighted  |
| Written story<br>Appendix C | Yemen team     | Lack expertise         | Yes, request   | Provided expertise              | Info faxed within 48 hrs                     | Solution for client                                       |
| Written story<br>Appendix D | Central Africa | Lack experience        | Yes, e-mail  | Provided experience             | Experience provided within 11 hours          | Client is advised in 24 hours                             |
| Written story<br>Appendix A | Zambia         | Lack information       | Yes, e-mail  | Provided information            | Just enough information, just in time        | Client advised  |
| Written story<br>Appendix F | Pakistan       | Lack expertise         | Yes, e-mail  | Provided expertise & experience | Expertise provided within 48 hours           | Expertise offered to client                               |
| Written story<br>Appendix G | Madagascar     | Challenge on expertise | Yes, e-mail  | Provided new expertise          | New expertise provided within 72 hours       | Alternative expertise offered to client                   |
| Oral Story 1<br>Appendix F  | Pakistan       | Lack expertise         | Yes, e-mail  | Provided expertise              | Received in 3 days                           | Pros and cons offered to client                           |
| Oral Story 2<br>Appendix F  | Pakistan       | Lack expertise         | Yes, e-mail  | Provided expertise              | Expertise received within real time          | Client receives expertise                                 |
| Oral Story<br>Appendix H    | Albania        | Lack information       | Yes, e-mail  | Provided information            | Information received within 48 hours         | Information received                                      |
| Oral Story 1<br>Appendix G  | Madagascar     | Challenge on expertise | Yes, e-mail  | Provided new expertise          | Expertise received within 24 hours           | Expertise received  |
| Oral Story 2<br>Appendix G  | Madagascar     | Challenge on expertise | Yes, e-mail  | Provided new expertise          | Expertise provided within 48 hours           | Expertise received.                                       |

Table 4.1 Written and Oral Stories

The benefit of putting stories in writing was to allow for consistency in the message delivery. The oral stories did not always get conveyed in quite the same way as the written. This table also shows the oral stories the tellers told and claimed as their favorites. Two tellers shared the Pakistan story during their interviews. Two shared the Madagascar story during their interviews. A third shared a story he created out of his own division during his interview.

The table demonstrates how the same patterns are projected in the oral delivery. The oral stories discussed more of the tension created from the dilemma. The dilemma still presented the explicit and implicit concerns. The break with the normative practice was obvious. The tensions that were not obvious were the unspoken norm and the potential concern, letting others know that you do not have all of the answers was risky during a reorganization. (See the section *Storyteller's Perspective: Consequences*.) As with the written stories, the outcomes and the consequences would be beneficial. Again, the consequences for ignoring the underlying concerns and the unspoken norm were not made explicit in these stories.

The fieldworker in the oral stories makes a decision to break with the normative practice by asking his/her colleagues for help. Having to make this choice imposed tension that extended beyond just helping the client. We know from these stories that a number of colleagues responded favorably. Were there others who purposefully chose not to respond? Was it possible that the contribution from them was important to know? Were there consequences for not getting all the information before going back to the client? In the oral stories, the client made important decisions from the responses. Were there other outcomes or consequences not shared in the story for the fieldworker having made the choice to break with the practice? The stories shared demonstrated only positive outcomes and perceived positive consequences. What other consequences should have been shared?

#### Discussion of Major Findings

The stories reviewed in this chapter are similar to other stories that have been found to exist within other organizational environments. For example, stories in another study mentioned in Chapter 2 revealed underlying concerns for employees. The difference between the stories in this study and others is that stories in this study were intentionally created to encourage change. The other stories emerged from corporate and colleague action or misaction (Martin et al., 1983)

and provided insights into the organizational culture and subculture. To be more effective, stories in this study needed to reveal more about cultural norms, organizational expectations and employee concerns.

In this study, the story's message was meant to encourage the listeners to break away from the organization's traditional ways of doing business. The consequences for breaking with the explicit normative practice, commissioning a study, were always positive. The storytellers discussed the underlying issues and concerns in their interviews, but did not feel it was necessary to build the issues and concerns into the stories. Therefore, positive consequences were never countered with how to handle the other pending issues. The stories became the promoters of innovation and the fieldworker characters acted as the innovators for the organizational initiative. The innovators demonstrated only the benefits for taking a risk to go against the organizational practices and norms.

The purpose of this study was to determine how story operated in the rollout of this initiative. This study was undertaken to determine story characteristics, the nature of the change portrayed, the generality of the story to the local situation, how stories were selected, how stories were constructed and the storyteller's perception of the impact of the stories.

Could the story be more effective in its message if the characteristics included all explicit and implicit messages? This would mean that the storytellers' stated story characteristics would have to be expanded (Denning, 2001b, p.197-199). The story elements to be true, brief and intelligible to a specific audience are still important. And, the story is more believable when there is an identifiable and known character that is representative of the core business. The story most certainly should be about something within the organization that is interesting enough to capture the attention of the listener. All these points are important to explaining the event.

The two final elements deemed important by the developers of the stories in this study, have a happy ending and contain a change message that is covert, may be reconsidered. Further research into the organizational value may reveal that story may not always have to have all positive factors to be successful. For instance, part of being true is relaying other concerns overtly. The continual happy ending of how one overcomes obstacles may seem contrived to those who know there are other issues and concerns that remain unspoken. The adult listener in this organizational environment likely knew there were other concerns to consider and wanted to hear it in the story all potential consequences before accepting this new innovation.

The storytellers in this study believed that all those who understood the organization understood the covert messages and, therefore, supported the intentional covert messages portrayed in the story. The tellers believed that the intent of the change story was to enable the listener to leap mentally forward to his or her own situation and consider how it might look if the change effort were considered. One teller claimed that if the listener were still caught up in the details of the story being told, the story was not effective (Appendix N: 191-200 & 499-512).

The teller believed that covert messages cause people to make up their own interpretations. Contrary to the notion of leaping forward, the listener can equally leap backwards. How do we know that if the underlying concerns and norms are not addressed and the listener believes these are major obstacles to moving forward, that the listener will choose to not move forward.

To ensure that these stories address all issues and concerns, the elements can be modified to include concerns, underlying issues and consequences. Figure 4.1 visually demonstrates the pertinent story elements. The event need only be an ordinary organizational event that everyone recognizes as relevant and truthful (Bruner, 1990). The story should also demonstrate explicitly the underlying tension that triggers the listener to search for meaning that is relevant to what s/he knows. Since this tension is connected to the organizational norms and practices, it will more likely mean something to the listener if it is described as a dilemma for the fieldworker. It is possible that the dilemma keeps the listener engaged long enough to see how the tension is dealt with and what vulnerabilities it creates. The consequences bring out the concerns that enable the listener to make the best decision and the mental leap to consider how the change can apply to his/her area of work. The ending culminates into the intended outcome, which is the benefit or how the vulnerability is overcome. The outcome describes how dealing with the consequences can bring about empowerment: accessing the community of practice or the advisory service; providing the client fast, satisfactory results; and how the fieldworker's credibility, status and reputation is maintained.

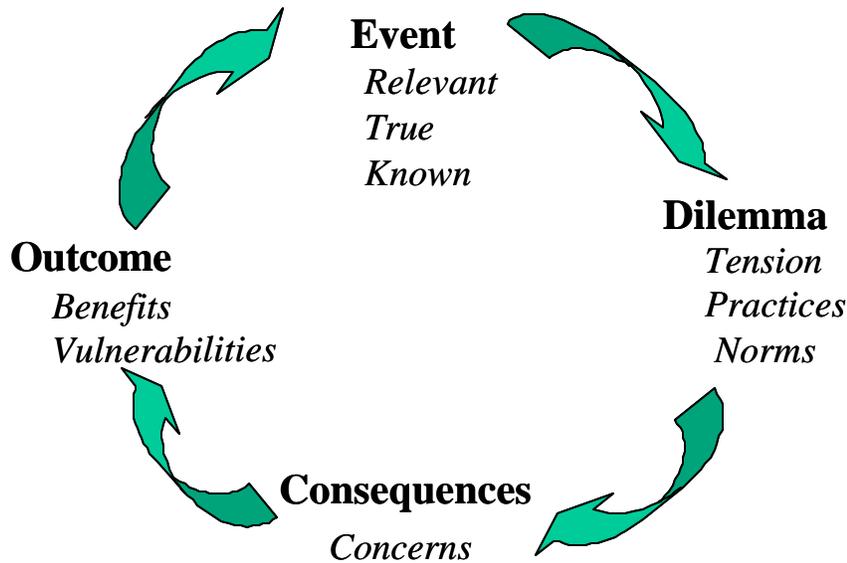


Figure 4.1 Story Elements

Finding and selecting stories that demonstrated that others were practicing knowledge management was tedious and time consuming. Committing to a template enabled the tellers to quickly review potential stories. The storytellers believed that their template was sound and did not mention whether it should be evaluated and improved. This study demonstrates that consideration should be made for including negative potential consequences and for explicitly resolving all potential issues and concerns.

The findings of this study lead me to believe that including the underlying norm and the security concern into the story construction could improve story effectiveness. Story construction was initially determined through trial and error. The storytellers admitted that they did not know anything about constructing stories, let alone building stories that facilitated the new innovation. However, they believed that over time they developed a template that worked. They believed the story message was understandable to all organizational staff that heard it. What was not clear was whether all staff believed it was possible to incorporate the innovation into their area, especially since there were other potential consequences that were not brought out in the story. By including more information on the norm and the security concern, others with those same concerns will more readily consider the story message (Martin et al., 1983). Adults

are best able to identify with a story when the message of the story relates to or resolves underlying concerns.

Including the underlying norm and security concern elements into the story construction could have allowed the story to better address common organizational concerns that were expressed by the storytellers. The generality of the story did pertain to the current situation by conveying a relevant situation that projected the core business activity. However, more generalization could have been made if the story included the unspoken norm or the reorganization. Bringing these elements into the story help relay the consequences for breaking with the normative practice and the consequences for adhering to the current practice.

The tellers perceived the impact of story to be effective. They knew of the challenges imposed by the client and they knew that the fieldworker experienced tension when challenged. However, the tension was not contained to one area. The tension stemmed from the type of help needed: political, technical or dispersed information and expertise . If the reorganization was not an issue for the listener, s/he would be more likely to buy into the message. Where ignoring the underlying norm was not an issue, s/he would also likely buy into the message. I was unable to confirm that it was really acceptable under any conditions in such a large traditional organization to break with the normative practice and ignore the unspoken norm. Without further research, it is hard to know how much the reorganization impacted the new initiative.

The initiative was supported and espoused by many members including the President of the organization. The President was known to have retold the stories in meetings. This may have been the only permission needed for the organizational staff to know that the stories were espousing a valid message. This raises the issue of the role of the managers. How involved with the fieldworker's success was the manager? Managers typically want their field staff to successfully deal with issues from the field and when they are challenged, s/he has an interest in protecting the reputation of his/her fieldworkers. Under what conditions do we know which strategies are the major motivators of managers?

### Summary

The tellers believed that the stories, written or oral, had to provide a "positive" solution. When changing tradition, people become fixated on the positive account (Rothman, 2001). The

tellers felt that if the story account was credible and the positive results could be demonstrated by going against the norms, the story was likely to be of value to the listeners.

The point in all stories shared was to challenge the listeners to start developing strategies that would help themselves and their customers to quickly gain access to information and knowledge. Although this large multinational organization was a financial organization, not a knowledge sharing organization, the stories, according to the tellers, somehow sparked interest in the listeners during the presentations.

Future stories could easily include more explicit statements about how it was possible for the fieldworker to save status and reputation by accessing the community of practice or the Advisory Service. This account could seal the positive ending for the listener. Employees will uphold tradition and cling to tradition while struggling to change. By including the additional messages “you are free to change practices,” and “it is okay to not always know”, the story could solidify the permission to change. These messages could be significant criteria for these tellers when building new stories.

The findings in this chapter on introducing this knowledge management innovation and understanding this organization cannot be generalized to any other organization. The next chapter will review how other research contributes to understanding this study’s findings.

## CHAPTER 5: DISCUSSION AND CONCLUSIONS

Stories do not simply tell people about what goes on in their organizations; rather, they should be examined in terms of their role in creating perceptual environments for organization members. In other words, they play a fundamental role in creation and reproduction of organizational reality.

(Mumby, 1988)

### Introduction

Organizations use a number of strategies to introduce new initiatives. These efforts include top-down approaches that deem the new way of conducting business to be immediate, to the bottom-up approaches that systematically change operations over time. No specific change methodology has been the “one size fits all” approach. Every organization has to find the approach that best fits it. The organization studied believed that using storytelling as a means of introducing a knowledge management initiative was working better than the strategies used earlier on this same initiative.

Using story as an approach for understanding and building identity within the organization is not unique. However, using it within an organizational environment as the main approach for change is uncommon. Organizational stories have been important in creating, identifying and maintaining organizational norms and relationships (Jordan, 1996). They have been used primarily to build cohesion and commitment amongst group members (Bruvand, 1996).

A number of writers have discussed the use of story as a vital approach for shaping strategy (Martin et al., 1983; Morgan & Dennehy, 1997; Rothman, 2001; Schwartz, 1996; Shaw et al., 1998). Only three writers discussed using story purposefully as a means of imposing a specific decision (Rothman, 2001; Schwartz, 1996; Shaw et al., 1998). Two used story as a means of building support and soliciting engagement of new organizational actions (Schwartz, 1996; Shaw et al., 1998). One study was related to building community activism efforts (Rothman, 2001). Other studies focused on the emerging cultural clues that revealed how story shaped norms and practices (Martin et al., 1983; Morgan, 1986; Morgan & Dennehy, 1997; Mumby, 1988).

Only minimal has been written about how story can intentionally contribute to introducing a new approach. The most recent relevant study found that stories could mediate conflicts and contradictions, and can have a positive and negative impact in the change process. That study examined the stories that emerged over time and were shared amongst employees within an organization (Feldman, 1990). This discussion will look at how bringing out this organization’s common concerns in the storytelling process could improve the organization’s chances for introducing new efforts. The argument is not yet solid, therefore further research is needed to provide a more in-depth look at how much or how little of an impact story can make.

Literature on organizational stories originates from the disciplines of education, sociology, communication, management and anthropology. This study was viewed through the lens of an adult educator with management experience.

The organization examined intentionally created stories as a means of facilitating a new innovation. The intent of the study was to examine how story operated during that process. Along with analyzing specific stories, the study examined the tellers' perspectives of the initiative to better understand how they came to use and create stories and what happened as a result. The stories used were based on the social context of this particular organization and created by the tellers who had a clear understanding of the organizational culture (Boje, 1995; Martin et al., 1983; Wilkins, 1984).

Exploring the role of story revealed three important issues that were essential to introducing the initiative. The story was meant to suggest that the listener break with normative practice, ignore an underlying norm and be aware of the consequences for doing so. The story presented an event that was relevant, true and known to all organizational employees. The event related to a dilemma that imposed tension on the fieldworker by challenging him or her to follow or break with the organizational practice and norm. The consequences for breaking with traditional practice and ignoring the norm were only favorable. We know that the consequences were favorable even when the traditional practice and norm are followed. We don't know if there were unfavorable consequences for not following the practice and norm. The outcome in each of these stories conveyed the benefits for accepting the innovation. The outcome does not address the potential vulnerabilities that could be encountered when accepting the innovation. See Figure 4.1 Story Elements in Chapter 4.

### Methodology

#### Unit of Analysis

Since story was the approach used to facilitate the innovation, it was the unit of analysis. To understand how story operates, the storytellers provided their perspective as to how the story was found, developed and shared. The storytellers' perspective was also useful in understanding how the listeners responded to the story. The limitation of this study is that it is constrained to the perspective of the storytellers and to the written and shared stories analyzed.

### Storytelling Defined

For the purposes of this study, examining the story is a way to understand the act of telling stories.

Storytelling is a form of discourse that combines several experiences of distant events. These events are told in a series of more than one statement to form a concrete example of a general principle that will allow a listener in a given situation to cognitively connect to the known and then to the probable.

### Storyteller and Story Selection

The Director of the knowledge management group provided names of tellers and direction on how to ascertain the written stories. The Director named the tellers that he thought had been the best presenters during the initiative. The criteria for selecting the volunteers were: 1) those who had presented throughout the initiative, 2) those who he considered to have good presentation skills and 3) those who were interested in the effort being successful. All tellers who were recommended were asked to volunteer. The tellers were members of the organization, yet not specifically members of the knowledge management group. Of the eight tellers invited, six volunteered to participate in this study.

The stories were provided by the organization and some were recited during the interview process. The written stories were found on the organization's website. Two stories that were not on the website were ascertained from another source (Denning, 2001b). Six written stories were gathered and analyzed. Five oral stories heard during the interviews were transcribed and analyzed. Four of the oral stories told matched two of the written stories and one story told during an interview did not match any of the written stories.

This study assumes that the presentation of story was not the only activity underway during the change initiative. Many factors could have contributed to the success of the overall change: the president's support, the style and presence of the teller sharing the story, the influence from peers and the ongoing reorganization. The question was not posed as to whether there were other potential influences. This study specifically examined the stories used during the initiative and the perceptions of the storytellers to determine the role that story played in the change initiative.

### Data Collection

The volunteers were interviewed separately and asked to share their experiences during the change initiative. The presenters were interviewed in one-on-one interview sessions. All interview sessions were conducted in a private space within the organization. The interviews lasted one hour. All interviews were audio taped and the tapes transcribed. The interview questions were used as a means of guiding the interviews; they were intended to get the interviewees to discuss at length how they selected the stories, how they knew which stories were the right ones for the group to whom they were presenting and the results they expected to produce.

I opened the interview session by stating that I was looking for their perceptions of what occurred during the knowledge management initiative. Most discussed how they prepared for these sessions, particularly how they chose and told their stories for each session and how they perceived these sessions as different from earlier sessions where the format had been different. The interviewees informed me about the normative practices, underlying norms and organizational expectations. The interviewees discussed how practices and norms had to be ignored for the initiative to be successful. The interviewees felt that the best way to help the listeners get this message was through simple, authentic stories. The tellers believed that the listeners did understand and were willing to do what was being asked. These interviews were transcribed and analyzed.

### Analyzing Data

The purpose for analyzing the written stories, oral stories and perspectives of the tellers was to discover the story characteristics and attempt to understand what the stories were meant to convey. Using the grounded theory systematic coding procedures, I transcribed and open coded all interviews and the narrative stories told (Strauss & Corbin, 1998). From the open codes, I was able to form storylines and analyze code sets and patterns. Based on Strauss and Corbin Qualitative Coding techniques, I carefully examined each data set by triangulating the storytellers' perception of story use, the oral story and the written story (Strauss & Corbin, 1998).

The data sets were validated by comparing data with the initial codes and with the guidance and expertise of my colleagues. I also looked for comparisons between what my data

revealed and what was stated in the literature. My colleagues, also students in the Adult Learning and Counseling doctoral programs, and I met weekly to review each of our data sets. My data were subjected to the open, axial and selective coding process and shared with colleagues to get feedback on my coding and interpretations. My colleagues appropriately challenged, questioned and probed the meaning of the data. In addition to my colleagues, three of my committee members evaluated and challenged my data findings and interpretations.

### Related Research

While attempting to add to the ontology of storytelling, it is appropriate to review the epistemology of storytelling as it relates to this study. The review identifies similar studies of story with both children and adults. The review also examines the characteristics and cultural implications of story.

Story as the lone presentation tool has been found to be more effective in listener retention than those sessions presenting only facts or facts with story (Cortazzi, 1993). Story by itself has also been shown to be a more persuasive strategy than other presentation strategies without story. Whether the story is positive or negative is not essential. More important is that the story conveys what needs to be heard, allowing the listener to decide if the situation pertains to him/her and, if so, can s/he make a decision that enables him/her to be better off (Freire, 1993).

Stories typically have a subject, an outcome and an adversary (Mitroff, 1983). The subject is usually the object or initiating force that creates cause and effect. The outcome reveals the consequences, lessons or help needed. The adversary is that which causes the dilemma. To be effective in capturing the interest of the listener, the subject must show obvious vulnerabilities when confronted by the initiating force or the adversary. This exposure draws in the emotion and intellect of its listeners, especially when it is possible they have been in a similar position (Kaye & Jacobson, 1999).

Another aspect of story that cannot be discounted is the daydream state that stories encourage (Cortazzi, 1993). What goes on in the listener's mind when listening to story is rarely discussed. Children embark on a journey with storytellers, placing themselves in the role of the character experiencing the struggles and rewards (Bettleheim, 1975). Adults, on the other hand, begin to make meaning of what is being heard and create their own meaning and reality as the

story unfolds. The teller is usually not the only person telling the story; the listener is also shaping his/her story (Cortazzi, 1993 p. 21).

Well-developed stories cover all points considered by an adult. Those stories place the adult into a situation they know, discuss the tension as it relates to the existing norms and concerns, reveal the consequences for the choices and present the expected or unexpected outcomes as a result of the consequences. Like the children's stories that discuss opposing forces, such as good versus evil, adult stories can share how people overcome difficulties during organizational transitions or changes (Cortazzi, 1993; Kaye & Jacobson, 1999). Story can address how to deal with changes as they relate to organizational rules, norms and practices. Listeners often express concerns that could affect their belief in organizational equity among peers, financial and emotional security and their ability to control their work environment within the organization (Martin et al., 1983). Stories among adults end up playing an important role in shaping the behavior of organizational members (Mumby, 1988).

To assist the organizational members in clarifying key values, norms and practices, stories tell members in a symbolic and demonstrative way how business is done (Martin et al., 1983; Neuhauser, 1993). In the case of one 3M story, an innovator was rewarded for pursuing the Post-it Note invention, despite the consternation of his boss. Employees, after hearing this story over and over, learned organizational reactions and values for taking risks. Another executive sold his organizational board on a new initiative by creating and telling a story (Shaw et al., 1998). The story had the board so engaged in the tale that the board became involved in actively solving the potential flaws and possibilities before accepting the initiative. The presenter succeeded in intentionally conveying the significance of this effort by guiding the board toward the best decision (Senge, 1990).

Values and norms demonstrated in a story may be more effective if surrounded by some type of conflict or opposition. Cortazzi's work found that stories were more effective when they included issues that oppose each other within the curriculum (1993). These issues were labeled binary opposites. Binary opposites are issues such as "change versus stability", "dependence versus independence" or "survival versus destruction" (Cortazzi, 1993 p.18). The notion was that teachers were to build these opposites into stories within the curriculum to demonstrate all angles of the topic, the dramatic struggles with conflict and how resolution was reached.

Teachers found that using these stories enabled them to explain particularly complex ideas more coherently.

Martin et al claimed that stories were reflective of emerging opposing concerns (1983). Their analysis of shared cultural stories within organizations revealed common values of equity, security and a sense of control (Martin et al., 1983). These themes emerged out of stories that were told and retold in a number of organizations. When these values were threatened, the organizational members experienced inequity, insecurity and lack of control. And, they began to share their concerns through story. Martin found these values were important and coined them dualities, which are not dissimilar to the binary opposites but are specific to issues and concerns faced by employees in the workplace. In each type of duality story, the character is forced to deal with contradictory elements that may be “simultaneously desirable and undesirable” (Martin et al., 1983 p.447). Whether intentional or unintentional, the message that most sticks with people is the one that introduces conflict and dilemmas.

When story includes information that introduces contradiction, one is likely only to have to share it in its entirety but a few times. Employees are quick to understand these kinds of organizational messages and, after hearing them a few times, will relate back to the story with the mention of only bits of key information (Boje, 1991). Bits and pieces of a story are enough for an employee to understand what it means in terms of making a decision or taking action. The longer a member has been in the organization, the fewer bits of information have to be shared for the employee to relate to the whole story. On the other hand, a new employee may not understand the full impact of the stories shared in bits and pieces or the underlying messages present in the stories.

Unlike other research, this study specifically deals with the story and its message toward facilitating innovation. The stories studied offered limited characteristics for capturing interest. Therefore, understanding how to build the most effective innovation story requires an understanding of the elements that capture and draw the adult listener into the story long enough to hear the message. To really know why, how or whether the listeners engaged in the stories they heard, we would have had to talk to the listeners. Also, further understanding is needed of the organization’s value system and its view of the traditional practices and underlying social norms. This study only looked at the stories and the storytellers’ perspectives of the results of using story.

The stories studied exhibit a shortcoming in presenting all potential concerns. The stories introduced the overt message to break with a normative practice. The tellers claimed that the covert messages were implicit in the story. The storytellers assumed that members of the organization understood the implicit messages surrounding the underlying norm of knowing all and the reorganization threat. Given further research, the stories could possibly be more effective if the covert messages and the consequences for mitigating the concerns were brought out in the story. These omissions emerged as potentially important elements to building a more effective innovation story. For instance, some stories could focus on people who were afraid to use the innovative practice.

### Review of Findings

This study examined stories told during the rollout of a major initiative in one organization. Under this section, a brief review of the overall findings, a review of the organization and an explanation as to why these stories should consider modifying the characteristics to include event, dilemma, consequences and outcome. The storytellers' perspectives significantly contributed to understanding how story was selected, created, used and why these additional characteristics may improve story effectiveness. However, the study recommendations are also limited in that the findings are derived from the storytellers' perspective.

The tellers who had a clear understanding of the organizational culture created the stories based on their perceptions of what made a good story (Boje, 1995; Martin et al., 1983; Wilkins, 1984). The stories were told during planned presentations as a means of intentionally facilitating a new knowledge management initiative. The Director of this initiative believed that the use of storytelling during presentations was instrumental in the organization's success for gaining employee buy-in.

As mentioned in Chapter 4, the stories studied were effective in conveying the benefits of innovation, however missed some necessary characteristics for providing the listener with all the information needed to make the decision to accept the new approach. The differences are depicted in Table 5.1.

Table 5.1 Comparisons of Existing and Proposed Story Characteristics

| Storytellers' Template Characteristics   | Suggested Characteristics  |
|--|--|
| True<br>Brief<br>Intelligible<br>Geared to specific audience<br>Identifiable and known character | <b>Event</b> that focuses on: <ul style="list-style-type: none"> <li>• Relevant</li> <li>• True</li> <li>• Known</li> </ul>  |
| Predicament based on client request (not based on norms or tension)                              | <b>Dilemma</b> <ul style="list-style-type: none"> <li>• Tension that is known</li> <li>• Norms affected by the proposed change</li> <li>• Practices affected by the proposed change</li> </ul> |
| Implications of future possibilities   | <b>Consequences</b> bring out existing concerns that relate to the proposed innovation   |
| Resolution of predicament<br>Change message that is covert<br>Happy ending                       | <b>Outcome</b> <ul style="list-style-type: none"> <li>• Personal benefits</li> <li>• Vulnerabilities</li> </ul>  |

The stories studied were meant to be short and to the point. They were meant to drop the listener into a known scenario, introduce the listener to a known and respected fieldworker, explain the fieldworker’s dilemma, describe the implications for the future if the choice to follow the change were selected and describe the outcome. Based on the template in its original form, the stories always ended favorably for the person facing the dilemma. Stories created and used were not intended to provide extensive information into the dilemma; they were meant only to state a common situation and quickly demonstrate the effect of the choice made to resolve that dilemma.

According to the tellers, the stories did not need a great deal of explanation. People were expected to be familiar with the organizational activities and know the conditions being experienced by the fieldworker. It was also expected that they would understand the struggles and traditional organizational practices. Those who had been with the organization for a few

years were more familiar with the cultural messages within the story, therefore better understood the covert tensions projected in the story.

### Organization

The organization was going through a reorganization during early 1996. Not only was it going through a downsizing, it was attempting to implement a major knowledge management initiative. During this reorganization, the soon to be knowledge management director was displaced and put into a position that led him to believe that he was on his way out and this was the organization's way to push him out the door.

I was simply in this difficult position, essentially, I think kicked out of the organization, after having been a highly successful manager—kicked out for no particular reason; just politics had changed....As it turned out, they had it in for everyone at my particular level; just sort of cleaning out all the people at my level. It took them a couple of years to do it. I was just one of the first people. It was nothing personal, as it turned out. And most of the people just left. But I wasn't quite ready to leave, so I stuck around. I was a desperate man. I'm ready to try anything.... So they told me to go and look into information. So, I looked at information and saw that that would save us money if we fixed all that up. Something needed fixing up but we needed, really, to do something more radical, and that was have a more relevant mission for the organization. (Appendix N: 6-19)

Now in charge of this major change initiative, the director hired a consultant to come in and provide guidance on how to establish a knowledge management program. The consultant advised the organization as to what knowledge management might look like if implemented within the organization. The consultant provided the organization with a knowledge management (KM) model that would fit its operations. The director and his new team set up and rolled out a series of presentations. These presentations were not well received.

People would be all upset at the end of it, and say, "This is nonsense, this doesn't make any sense, it's all bullshit." And you'd wonder what had gone wrong. (Appendix N:74-78)

Well, we first went through the process of trying to explain what is knowledge sharing—or, at the time, knowledge management. And the more you tried to explain it in a jargon that was used at the time in the industry, the more we lost our audience... (Appendix L: 32-38)

Getting the initiative off the ground was problematic. One manager explained that taking the consultation to a level of implementation was not easy. This manager claimed that those

involved in the effort had to design a model that better fit the organization and since the vision of the effort was not clear, the effort was constantly evolving.

...In our case, the whole implementation was -- you know, we didn't know exactly what we were doing. We invented the model as we went. That's a very important distinction to make. When we talk about communication, now, it was communication about a story, which was evolving very fast. The whole idea about implementing knowledge management and the way we were going about it was actually changing very fast based on the earlier results we got, how people were responding to the design. So it was adjusted all the time. (Appendix J: 120-135)

The initiative began to gain acceptance only after a serendipitous event occurred. The KM team began to see positive results after the director of the KM initiative repeated a story that he had heard during lunch with a friend. The friend had shared a story about how a worker in a remote location in Zambia had found information through the Internet.

Thus, in June 1995, a health worker in Kamana, Zambia logged on to the Center for Disease Control website and got the answer to a question on how to treat malaria. This story happened not in June 2015, but in June 1995. This is not a rich country; it is Zambia, one of the least developed countries in the world. It is not even the capital of the country; it is six hundred kilometers away. But the most striking aspect of the picture is this: our organization isn't in it. Our organization doesn't have its know-how and expertise organized in such a way that someone like the health worker in Zambia can have access to it. (Denning, 2001b)

The employees identified with the event: worldwide remote location and the need for critical information. The employees could also identify with the fieldworker in a remote location unable to gain access to needed resources. Normally, this location would not have had the computer or the Internet connectivity available to the health services worker. The point in this story was to challenge the organization to consider whether it should be involved in these kinds of efforts. After sharing this story a few times during early presentations, the director decided to find stories that were relevant to his own organization. He found bits of information that demonstrated that there were efforts already underway to change the organizational practice for sharing information and knowledge.

The director and his team decided that the stories should contain certain criteria that were relevant to capturing the listener. This study agrees with some of the criteria suggested and recommends building on the criteria to better address underlying norms and concerns. The suggested criteria, event, dilemma, consequences and outcome, are discussed below and include the elements contained within each.

### Event

The story contained an authentic event that was real, relevant and known by the employees in the organization. The specific event does not have to be known, but the nature of the activity has to be representative of the core business. The stories, for the most part, did reveal these elements.

### Dilemma

The dilemma did consist of three elements: tension, norms and practices. The dilemma in the existing stories was meant to refer to the dilemma between the client and the fieldworker: an answer or solution was needed immediately. The dilemma was really about an underlying message that led employees to believe that they had no other choice but to break with the traditional organizational norms to be successful. To improve the story dilemma and explicitly address concerns, the story could recognize how the fieldworker has always been rewarded for following the normative practice and adhering to the unspoken norm in the past.

The story could make explicit all tensions that may be experienced facing a new innovation. The tensions in these stories may have emerged from the reorganization and from changing the normative practice and expectations. The client's request for fast service imposed the first level of tension. The dichotomy was adhering to the normative practice or breaking with the practice. The choice to break with traditional practice had to be made without penalty. The second level of tension, concerns as to how this affects the field workers' stature within the changing organization, was not addressed but could have been. The organization was downsizing and, according to the storytellers, fieldworkers did not want to appear less than an expert.

This fear of ignoring the unspoken norm and admitting ignorance created yet a third level of tension. The stories studied did not clarify whether or not there were vulnerable consequences to the tensions. The stories only revealed favorable consequences.

### Consequences

According to the storytellers, anyone who had been within the organization for any length of time must have known the risks involved in ignoring the traditional processes (Boje, 1991).

Neither the tellers or the stories revealed any evidence of management support or concern for the new actions. The fieldworker was on his/her own to make a decision that may or may not have been blessed by their managers and potentially put his/her job on the line. Therefore, the emerging concerns from the reorganization and support from upper management could be brought out under this criterion.

The story implied common tensions that may or may not have been shared and understood throughout the organization. These tensions are relative to the dualities found in other organizations that reveal common organizational concerns (Martin et al., 1983). The tensions that describe concerns were only somewhat evident in the stories examined. The storytellers revealed the most about the contradictory concerns that are desirable and undesirable (p.447, Martin et al., 1983): use the normative practice versus use the new practice and adhere to an unspoken norm versus ignore the norm.

### Outcome

In each of the stories, the field worker chose to break with the normative practice and admit to colleagues that they needed help. The benefit was a short turn around time for the fieldworker gathering shared information and expertise. The customer's needs influenced the fieldworker into deciding that following the normative practice would take too long.

Finding an alternative strategy was deemed necessary, and the fieldworker proceeded to demonstrate the outcome of his/her choice. The outcomes in the stories, the time benefits, examined are conveyed as positive. Could this positive outcome also have placed the fieldworker in a vulnerable position? Could the positive outcome result in a unfavorable consequence, or must the outcome be negative when the consequence is unfavorable? When a unfavorable consequence is brought out in the story, it seems that the storyteller can demonstrate how the outcome can still be positive. For instance, the organization may always look favorably on serving the client's request, even if norms and practices are circumvented or ignored. However, the organization may not look favorably on such deviations.

### Need for Further Research

This study identifies how emerging organizational concerns can be applied to building a more effective story for encouraging innovation. The findings of this study, however, may not be generalized to another organization. Additional research is needed to accomplish that goal.

In this study, it appeared that the traditional norm and the underlying norm held some amount of power. Further research could help reveal why these norms might make change difficult.

The type of innovation, the unit of analysis and understanding the organizational culture were constraints in this study. Another constraint was not being able to talk to the listeners about how they perceived the stories worked. How the innovation was presented and implemented may differ from how it would be initiated in other organizations. The tellers did say that the consultant's knowledge management framework didn't fit the organization and they were shaping the knowledge management program as they went along. Other organizations will have their own power struggles and reorganizations that will affect their knowledge management implementation.

Only eleven stories were examined within this one organization, therefore the analysis is only applicable to this organization's stories. Even though the unit of analysis was the story, the storytellers brought additional insights into understanding what the stories were meant to convey. Further conversations with the tellers could reveal more about the organizational culture and the innovation. That additional information might change the story context.

Understanding the organizational culture could also have additional impacts on determining effective story use. For this study, further research should be conducted to glean more about the nature of this organization's norms, practices and rules and the power of each within all organizational arenas.

Talking to the listeners could have brought out potential alternative points of views. The listeners input could have provided additional insights into whether it was story that made the presentations effective. If it was, their input could add to what would make story even more effective in that organization.

From the data gathered and analyzed, I saw this organization's framework for developing stories, Figure 5.1. This framework may be used, evaluated and further refined. The intent is

that it be considered when developing the next set of initiative stories. Within the knowledge management initiative, the organization under study imposed a mandate that the organization would reshape itself into a knowledge sharing organization and be known at the global level as a “clearinghouse” for knowledge (Fulmer, 2000 p.7). This effort was met with opposing forces that challenged the success of the introduction.

The innovation’s introduction is represented in the framework. The framework demonstrates the challenge as the new innovation. This challenge is faced with opposing organizational norms, practices and rules that emerge out of the organization’s context. Ignoring these traditional norms inevitably create tension and reveal vulnerabilities with field workers who are not the innovators or early adopters of the newly imposed initiatives. The notion of the framework is that the use of story diffuses the impact of the opposing forces by describing how innovators or early adopters of the new innovation are successful. The story describes how each field worker at a given point in time (event) manages the dilemma faced. The story brings out the forces of tension and concerns by explaining the consequences. It also presents a clear outcome for dealing with the benefits and the vulnerabilities faced when transitioning to the new innovation. This framework assumes that the all the elements in the context are made explicit in the story.

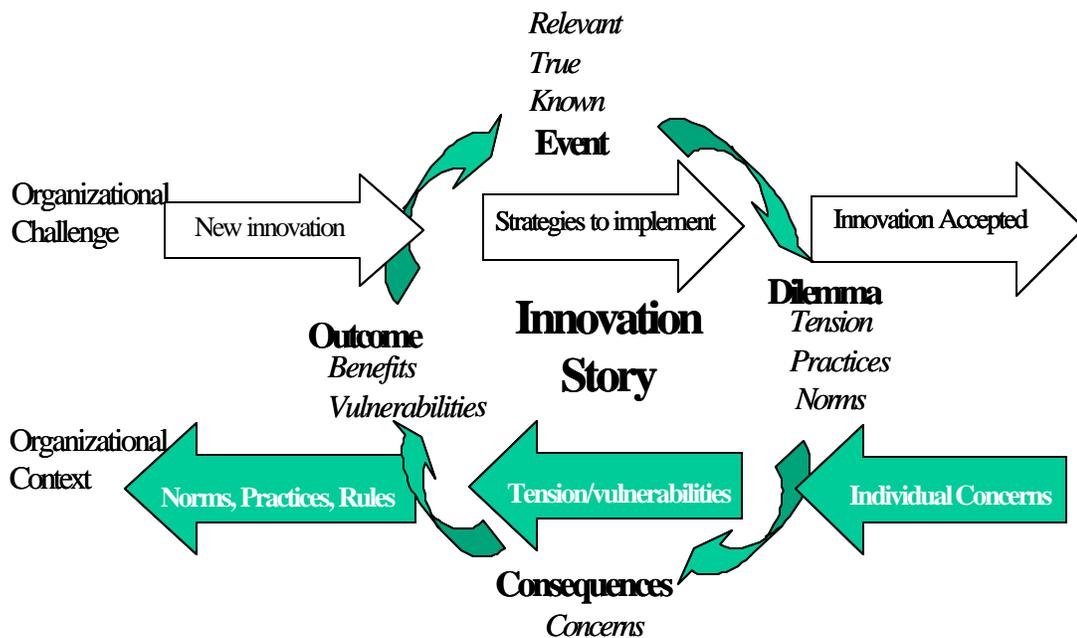


Figure 5.1 Leading Innovation Through Storytelling Framework

The framework, once used, must be evaluated. Participants in this organization's future story presentations could be interviewed after each presentation to elicit their perceptions of the effort, what concerns they have and whether they were addressed. The tellers of the stories can also be interviewed to gain their perspectives of the effectiveness of the story and its perceived affect on the listeners.

The next table, 5.2, is an example of how the stories studied could have added elements brought out in the framework to address the issues discussed by the tellers. The organizational story is modified to more explicitly address the important, yet unspoken norm and consequence.

Table 5.2 New Elements Incorporated into the Current Story

| Characteristics and Elements | New Change Story  |
|------------------------------|---|
| Event                        | In August 1998, the government of Pakistan asked our field office in Pakistan for help in the highway sector. They were experiencing widespread pavement failure. The highways were falling apart. They felt they could not afford to maintain them. They wanted to try a different technology, a technology that we have not supported or recommended in the past. And they wanted our advice within a few days. |
| Dilemma                      | I think it's fair to say that in the past we would not have been able to respond to this kind of question within this time frame. We would have either said we couldn't help <i>because we didn't know the answer</i> , or <i>we would</i> have said to them that this technology is not one that we recommend or we might have proposed to send a team to Pakistan.  |
| Unspoken Norm                | <i>We know that it is inappropriate for us to say that we don't know.</i>   |
| Consequence                  | <i>You no longer have to worry. Senior management recognizes that we can't know it all and therefore believes that we as a community of colleagues offer far better insights, information and knowledge collectively than we can as independent experts.</i>  |
| Traditional Practice         | <i>And it is common practice for us to send a team to look around, write a report, review the report, redraft the report, send the report to the government, and eventually, perhaps three, six, nine months later, provide a response. Maybe we have saved face and gathered substantial amounts of information and direction, but by then things have moved on in Pakistan.</i>                                 |

## Characteristics and Elements

## New Change Story

|   |   |
|---|---|
| <p>Consequence:<br/>okay to break with<br/>tradition and the<br/>norm.</p>  | <p>What actually happened was something quite different. The task team leader in our field office in Pakistan sent an email and contacted the community of highway experts inside and outside our organization (a community that has been put together over time) and asked for help within forty-eight hours. And he got it. <i>The community of practice did not ridicule him because he didn't know the technology; rather his request for help was overwhelmingly positive.</i> The same day the task manager in the highway sector in Jordan replied that, as it happened, Jordan was using this technology with very promising results. The same day a highway expert in our Argentina office replied and said that he was writing a book on the subject and was able to give the genealogy of the technology over several decades and continents. And shortly after that, the head of the highways authority in South Africa—an outside partner who is part of the community—chipped in with South Africa's experience over several decades with something like the same technology. And New Zealand provided some guidelines that it had developed for the use of the technology.</p> |
| <p>Introduce<br/>Strategies</p> <ul style="list-style-type: none"> <li>◆ New practice</li> <li>◆ Breaking the norm</li> </ul> |   |
| <p>Outcome</p> <ul style="list-style-type: none"> <li>◆ Empowered</li> </ul>  | <p>And so the task manager in Pakistan was able to go back to the Pakistan government and say this is the best that we as an organization can put together on this subject, then the dialogue can start as to how to adapt that experience elsewhere to Pakistan's situation. <i>The team leader took a risk, one that provided incredibly positive results for him, the organization and the client. He now knows that he can consider different approaches to assisting a client.</i></p>   |
| <p>Vision of Change<br/>Affected</p>  | <p>And now that we have realized that we as an organization know something about a subject we didn't realize we knew anything about, now we can incorporate what we have learned in our knowledge base so that any staff in the organization anywhere at any time can tap into it. And the vision is that we can make this available externally through the World Wide Web, so that anyone in the world will be able to log on and get answers to questions like this on which we have some know-how, as well as on any of the other myriad subjects on which we have managed to assemble some expertise.</p>   |

This proposed story can be tested for effectiveness in a variety of environments within this organization. The effectiveness test should include reviewing the stories to ensure all

elements are integrated into the story. To find the right elements, the tellers could devise a quick survey to administer after the presentations to find the key information learned. That information could be mapped to the framework. Does the information ascertained reveal norms, practices and rules? What are they? Which are implicit? Which are explicit? How do the change strategies affect the current operations as they tie to the norms, practices and rules? How do the norms, practices and rules impact employee concerns? This information is then built into the story. The story reflects an authentic event that most everyone recognizes. It presents the employee experiencing the dilemma. It also demonstrates how the employee faces the challenges, norms, practices or rules, while not jeopardizing his/her security, equity and control within the organization. Some changes may actually improve the employee's position of security, equity and control. Where this exists, explicitly bring out in the story how the improvement will occur.

### Story Use Strategies

This argument needs development, therefore further research should be conducted to determine if there are better frameworks to work from. Stories, if effectively created and used, have a place in any leading innovation initiatives. Stories can be used to set the stage for discussion in any change initiative. Organizational leaders, instructional designers and change agents are just a few who can benefit from the use of story. Instructional designers can incorporate story into course design. Training becomes the opportunity to introduce the innovation. After the story is shared, the instructor can facilitate a discussion on how well the key points were understood and the participants' remaining concerns.

As in this study, the story can be used as a stand-alone approach for presenting a new innovation incorporating a question and answer session. The change agents should begin the question and answer session by asking questions that get to the point of understanding the underlying norms within that organization. Change agents should also elicit the listeners' concerns regarding challenging these norms. The better understood the challenges, the more prepared the agents will be for recognizing issues of security, equity and control.

### Summary

Stories tend to capture the essence of the cultural fabric within an organization, easily drawing listeners into identifying with conditions made explicit. It is more likely that the listener will evaluate his/her own concerns and make the cognitive leap if the conditions in the story are relevant and possible within his/her own environment (Alvesson & Berg, 1992; Martin et al., 1983). In order to do this, the underlying message “we have to change the way we do business” must be made more explicit in intentionally created stories (Storyteller 3: 974-975). Listeners know the whole story as the organization currently exists (Boje, 1991). Listeners do not always understand the underlying messages within the story that are contradictory to the way the organization currently does business. Building these stories so that the listener understands the message enough to take action is important and key.

When the implicit messages are brought to light, the story reveals to the listener how the new information affects moving forward with the innovative effort. The story challenges the listener to consider potential changes to existing practices and norms. Hearing concrete examples helps the listener consider those changes and the normative practices and normative issues at stake. The listener is also able to understand the imposed consequences, based on choice of action. The story provides a symbolic image of how others in the organization are empowered to take new actions.

This study provides yet one more roadmap within one organization that could eventually contribute to creating and using story effectively as a means of introducing innovation. Future studies in this area may help further develop the use of story in the field of adult learning. The adult learning field has only minimally acknowledged through research the value of story in the adult learning environment. Informally, the practitioner field has always included story. This study's contributions can move the field of adult learning a little bit closer to offering a framework for creating effective stories for leading innovation.

APPENDICES

## Appendix A (Zambia):

What will the twenty-first century be like? What I want to suggest to you is that the future is going to be very much like today.

Thus, in June 1995, a health worker in Kamana, Zambia, logged on to the Center for Disease Control website and got the answer to a question on how to treat malaria.

This story happened, not in June 2015, but in June 1995. This is not a rich country: it is Zambia, one of the least developed countries in the world. It is not even the capital of the country: it is six hundred kilometers away. But the most striking aspect of the picture is this: our organization isn't in it. Our organization doesn't have its know-how and expertise organized in such a way that someone like the health worker in Zambia can have access to it.

But just imagine if it had! We could get ourselves organized so that professionals have access to the resources needed, just in time and just enough.

Thus when it comes to best practice—our teams will want not every best practice under the sun, but just the lessons of experience that are relevant to the particular task in hand. Similarly with the bibliography: our teams will want not the whole Library of Congress, just the references and citations that are relevant to the particular project. With policies and guidelines, our teams don't need the whole massive operational manual and all the other policy guidelines that have accumulated over decades—just the sections that are relevant to the job under way. Again, with country information, our teams don't want everything we know about the countries, just the people and correspondence that lead up to the work now ongoing—in effect, “the story so far.” Also, they don't want all the previous reports—just the reports that had been done in the same field as the task at hand. And in signaling who knows what, the team wants to know not who are the gurus generally, but rather who can answer questions on key issues relevant to the particular area of work. Equally, in analytical tools, the team wants spreadsheets showing previous economic, financial and technical analyses of earlier work in the same area, not everything that has been done.

And if we can put all these elements in place for the task teams, why not for the clients? They have exactly the same needs as the employees. Imagine: if we can do this, true partnership can emerge. Moreover, a whole group of stakeholders around the world who currently lack access to the intellectual resources of the organization will suddenly be in the picture. It will enable a different relationship with a wider group of clients and partners and stakeholders around the world. It adds up to a new organizational strategy.

## Appendix B (Chile):

A leader of one of the multi-disciplinary task teams was in Santiago, Chile, when our client contacted her and asked: quick, what is the experience of your organization in other countries in dealing with the demands of school teachers?

As it happened, she didn't have the full answer to the question on hand.

So she contacted the advisory service of the education network who was able to assemble for her experiences from other staff working in other countries around the world that were analogous to the situation of Chile.

The material was sent to Santiago electronically and the task team leader was able to synthesize the material and in a matter of hours, the client had the answer—a feat that would have been impossible without having the advisory service make the connections between the task team leader and the other staff working on similar issues in other countries. The client was delighted with the responsiveness, and the transaction led to an intensified collaboration in the sector.

What will happen in the future? What we have learned from the Chile experience is now recognized as being valuable. The material can be edited for further re-use and entered into the knowledge base, so that when a new client with similar problems, say, a country in Africa, asks another task team for the global experience in this area, the answer is readily accessible through the organization's Intranet.

This will only happen if three conditions are in place: first, if there is a classification system that enables one to find the Chile synthesis in a large knowledge base; secondly, if the education advisory service has an easy to contact human being who can answer questions and guide the search; and thirdly, if there is an institutional technology platform that makes it easy to find things across organizational boundaries.

So as the story continues, the African experience will be edited for further re-use, and entered into the knowledge base. Other inputs from other parts of the organization—and outside—can also be added.

Later on, when the system is fully developed, and the expertise is made available externally, when yet another client—say from Asia—has a question in the same area, there are new possibilities. The client can go into the knowledge base on its own through the World Wide Web, and find the Chile synthesis, find the African synthesis, find the other inputs, and then either use them on their own, or ask for assistance in applying it to its local situation. In this way, the know-how is made available quickly, inexpensively, for all the world to use.

## Appendix C (Yemen):

In July 1997, our organization had a task team in Yemen, a country in the Middle East and one of the poorest countries in the world. The team was working with a client on a education project and was coming to the end of its visit.

Then something unexpected happened. The client toward the end of the visit asked for some urgent advice. It wanted to know what it should do about building an information system for its education services. As it happened, the members of the task team didn't happen to have this particular expertise either in their heads or in their brief cases.

So they contacted the staff of the help desk of the education sector, who were in touch with the relevant community of practice. They were able to ascertain that the best and most relevant piece of expertise on this subject was in Kenya, in Africa, where similar work had been done, along with a critique of its strengths and weaknesses. The results of the Kenya work were then faxed to Yemen so that within a forty-eight hour time frame the task team could be sitting down with the client and discussing the solution to the problem.

Without the organization's knowledge-sharing program, things would have happened very differently. The task team would have told the client that they would get it to him, and then would have gone on to another country, in this case Jordan. Eventually, the team would have got back to Washington and—let's assume they remembered—would have searched for and found the answer, and dispatched it to Yemen. The answer would have got there within weeks, rather than days, and the team would not have been present to discuss it with the client.

Nor does the approach stop with merely satisfying the client. Now that we have established that the Kenya expertise is valuable, that can be edited for re-use and entered into the electronic knowledge base, so that when other staff in the organization face a similar problem, they can find it by way of the organization's intranet.

Moreover, when external access is established, clients would be able to find the answer directly, in minutes, if they so desire. There is a dramatic acceleration of cycle time in providing advice from what used to be weeks, to one where answers can be found in minutes.

While the magic of technology is enabling this to happen rapidly, what underlies the transformation are people—people operating in communities of practice where sharing is a normal way of operating, so that when the request comes from Yemen, there is a human community in place that enables the help desk to find precisely the right piece of expertise.

## Appendix D (Central African Republic):

On December 15, 1997, a task manager in the Central African Republic was confronted with a problem. He had been asked to advise the Government on an aspect of privatization of the local phone company. The question was: How to deal with a minority shareholder who has a right of first refusal? As it happened, he didn't know what had been done in similar issues in other countries. In the past, what would have occurred is that the task manager would have promised to get back to the Government once he returned to Washington and could research the issue.

Now, with knowledge management in place, he was able to contact the community of practice in the network by email and asked for urgent help. In Washington, D.C., the leader of the community of practice was able to provide him by email with similar Kenyan experience in the telecommunication industry. This happened on the same day. The coordinator also copied his answer to the rest of the community of practice and asked them to share directly their own experiences with the task manager. As a result, on the same day, an additional insight is sent to the task manager in the Central African Republic from preemptive rights experience in Morocco—from an unexpected source in a different sector—the oil industry. The elapsed time was 11 hours.

As a result, the next day at 10 a.m. back in the Central African Republic, the task manager, on the basis of experience that he had learnt about in Morocco and Kenya, was able to advise the Government of the Central African Republic on this aspect of privatizing the local phone company. The overall elapsed time was less than 24 hours to help solve a complicated problem in which the actors were scattered over the globe and the relevant know-how was located in unexpected places.

Now that the experience has been identified, it can be captured and stored in the electronic knowledge base for use by others—inside or outside the organization—who are confronted with a similar issue.

## Appendix E (Zambia):

In March 1998, the Government of Zambia had announced that it was planning to introduce elections for the mayors of its cities—previously mayors had been designated by the president of the republic—and was grappling with the question of how to implement the mechanics of the decision in terms of organizing mayoral elections. The field office of our organization alerted the task manager of public sector management of the ongoing discussion within the Government of Zambia and inquired whether we had any expertise to help.

When we consulted our existing knowledge base in the area, there was no relevant guidance and so the task manager contacted, by electronic mail, the community of experts in the subject area, inside and outside our organization, and asked for help.

And help arrived promptly. An expert from one unit contributed the experience of Madagascar which was closely analogous to the situation of Zambia. An adviser from the urban community of experts contributed a set of insights revolving around the thought that the question had been framed in the wrong way: it wasn't so much an issue of how to organize the mayoral elections themselves, but rather how to harmonize the elections of both the mayors and the city councils so that ongoing power struggles didn't dominate the political agenda. And several experts from outside organizations and several outside partners also chipped in with their contributions.

As a result, the task manager, instead of being unable to make a contribution to the problems, was in a position to provide a broad spectrum of advice from around the world, just enough and just in time.

## Appendix F (Pakistan):

## Written Story

In August 1998, the government of Pakistan asked our field office in Pakistan for help in the highway sector. They were experiencing widespread pavement failure. The highways were falling apart. They felt they could not afford to maintain them. They wanted to try a different technology, a technology that we have not supported or recommended in the past. And they wanted our advise within a few days.

I think it's fair to say that in the past we would not have been able to respond to this kind of question within this time frame. We would have either said we couldn't help, or have said to them that this technology is not one that we recommend or we might have proposed to send a team to Pakistan. The team would look around, write a report, review the report, redraft the report, send the report to the government, and eventually, perhaps three, six, nine months later, provide a response. But by then things have moved on in Pakistan.

What actually happened was something quite different. The task team leader in our field office in Pakistan sent an email and contacted the community of highway experts inside and outside our organization (a community that has been put together over time) and asked for help within forty-eight hours. And he got it. The same day the task manager in the highway sector in Jordan replied that, as it happened, Jordan was using this technology with very promising results. The same day a highway expert in our Argentina office replied and said that he was writing a book on the subject and was able to give the genealogy of the technology over several decades and continents. And shortly after that, the head of the highways authority in South Africa—an outside partner who is part of the community—chipped in with South Africa's experience over several decades with something like the same technology. And New Zealand provided some guidelines that it had developed for the use of the technology. And so the task manager in Pakistan was able to go back to the Pakistan government and say: this is the best that we as an organization can put together on this subject, and then the dialogue can start as to how to adapt that experience elsewhere to Pakistan's situation.

And now that we have realized that we as an organization know something about a subject we didn't realize we knew anything about, now we can incorporate what we have learned in our knowledge base so that any staff in the organization anywhere at any time can tap into it. And the vision is that we can make this available externally through the World Wide Web, so that anyone in the world will be able to log on and get answers to questions like this on which we have some know-how, as well as on any of the other myriad subjects on which we have managed to assemble some expertise.

## Oral story—1

Yeah, so basically what we would have said, and we had a few power point slides to illustrate that um, in for example in Pakistan and we would show the picture of the person, what we call a task manager was talking to the Minister of Roads and Highways in Pakistan and uh, the roads surfaces in Pakistan had deteriorated very badly and they wanted to repair them well using a new technology, it was not so much a new technology it was new to the bank. The bank had not supported that kind of technology. It was in other words they wanted something different from what we'd normally done. And the Bank Task Manager who is a highway expert in the past would have said, "well I have to

find out about this new technology, I'll have to do some research, I'll go back to Washington, I'll commission a study and it takes three or six months before we will send you the report." But instead of doing that, what he did was send an email to his community of practice what we call a thematic group.

So the Roads & Highway thematic group, he emailed them, "here's my question, can anybody help me?" Same day, got a response from somebody in our Indonesia field office saying we've used this technology and here are the pros and cons. Also the same day somebody from working on Jordan emailed him with a lot of experience on this new technology. Within another day or so he got inputs from various other parts...and also from one of our field offices in Argentina where somebody said well not only had he experience with this technology but he was actually writing a book and he had some policy advice. And he also got responses from outside partners, the South African Roads & Highways, Safety Board and also from New Zealand. So very quickly within like three days he got the just in time, just the slice of knowledge that he needed to be able to go back to Pakistan and say this is the experience, this is the policy advice, here are the pros and cons. And so, that they were able to then move forward with the new loan for this new technology.

## Oral Story—2

One that I was very fond of because it's in my area was this one about a mission that was visiting Pakistan, I believe it was. And there was a new director of roads. And he said, "Look, the road we've been doing for all of these years is just totally failing us. I have an opportunity to get some budget funds to pilot some really interesting alternatives.

Can you give me some other answers? -- other than these asphalt-sort of roads which are high maintenance and don't work in the very hot weather because they melt and so on and so forth."

Again, the task manager had some ideas but really couldn't give an answer. The typical answer would have been, in the old days -- it would have taken such-and-such time to get an answer to the guy.

Again, what he did is get on his laptop and send out an e-mail and got an answer from different people, different parts in headquarters, the thematic group leader.

But the most interesting -- there were several answers that came to him. The most interesting one, again, came from an outside member of the thematic group; the director of roads -- his name was Nazir Ali (sp) -- in South Africa in the Ministry of Transportation.

He actually said, "We've been doing these alternative technologies -- soil cement and so on and so forth -- for years. And not only is this our experience, but I'm sending you, by attachment, technical specifications for the whole thing."

So it's like a dream come true. You know, the minister -- or director runs out a request from the bank staff member and the staff member was able to respond in real time. So that was a favorite story of mine.

## Appendix G (Madagascar):

## Written Story

Near the end of 1998, the team leader had a problem. He was heading a group...in Tananarive, the capital of the African island of Madagascar, in a comprehensive review of the country's public expenditures. The work was a collaborative effort with the government of Madagascar and a number of the other national and international partners.

The team leader found himself at the center of a mounting controversy over introducing a value-added tax in Madagascar. The purpose of the tax was to have a single tax replace other individual taxes that had become cumbersome to administer and ineffective in raising revenue, in order to ease the government's administrative burdens while safeguarding and enhancing public revenue. The controversy concerned whether medicines should be exempt from the value-added tax. Some favored making an exception in order to advance the cause of health care, particularly for the poor. Others were concerned about making any exception to across-the-board implementation, because once one exemption was allowed, others would follow, and the implementation of the tax would soon become even more complicated than the current patchwork of taxes it was replacing. The controversy was becoming steadily more heated.

The team leader was a seasoned professional with many years of experience in the field and had seen other schemes for simplifying public taxation flounder because of such exemptions. He was therefore inclined to side with those arguing against the exemption, but as the controversy gathered momentum, he could also see that the debate could jeopardize the success of the entire public expenditure review.

What usually happened in past situations was that the team leader would try to persuade the review participants of the wisdom of his viewpoint and, failing persuasion, would return to...headquarters in Washington, DC, to consult with colleagues and supervisors. He would eventually give the other participants the...official "position," in the hope that this would resolve the controversy. Often such official "positions" merely set off further controversy, which could last for months or even years, undermining the spirit of collaboration essential to public expenditure management.

In this instance, as a result of the knowledge management program underway..., what actually happened was quite different. From Tananarive, the task team leader sent an e-mail to his colleague practitioners in tax administration inside and outside...a community that had been built up over time to facilitate the sharing of knowledge. He urgently asked about the global experience on the granting of exemptions for medicine.

Within 72 hours, the responses came to Tananarive from various sources, including...staff members in the Djakarta field office, the Moscow field office, the Middle East, the development research group, a retired...staff member, and a tax expert at the University of Toronto. From these responses, the team leader could see that the weight of international experience favored granting an exemption for medicines. So he was able, within days, to go back to the other review participants, lay the international experience on the table, and so resolve the issue. As a result, an exception was granted for medicines, and the public expenditure review was completed collaboratively.

Knowledge management does not stop there. Now that the...has realized that it has learned something about the design and implementation of a value-added tax, specifically how to approach exemptions, it can capture that experience, edit it for re-use,

and place it in its knowledge base, so staff can get access to it through the Web. The vision is that this know-how can be made available externally through the Web, so that anyone can get answers to questions on which...has some explicit know-how and on other myriad subjects on which it has assembled some expertise. (Denning, 2001a)

### Oral Story—1

It's a case of a task team that's in Madagascar. They're doing a study and a project to help the government install a value added tax. An issue came up in the value added tax, which is whether medicine should be covered by the value added tax or could it be exempt.

It's a sensitive issue. There were a lot of questions in terms of what the impact would be from having it or not having it; both in fiscal terms and social terms and so on.

So, what the task team did was, the task leader of the mission simply sent out an e-mail to the thematic group -- you know, the thematic group on -- I think it's called tax and something -- some thematic group. Literally, overnight, he had responses from people in Washington, a fellow colleague that was in the field at the time, another colleague that works in the resident mission in Argentina.

Another member of the thematic group was a retiree and another member of the thematic group wasn't even bank staff. He was in, I think, a university in Canada. So he had, like, eight or nine answers to his question in, like, 24 hours, and was able to make a decision on the spot and get the thing going.

In the old days, you normally would say, "Well, Mr. Minister, we really don't know about that. Let me get back to you." We'd come back and, three weeks later -- we'd research it and so on and so forth, and send a fax or letter or whatever. And it just added to the time to lessen the impact of whatever you're trying to do.

### Oral Story—2

Internally, there is a story of how -- a group of our colleagues was in a country and they were faced with an issue while they were negotiating over some value added tax and whether it should be applied to medicines or not.

The instinct of the team and the team leader was that they should not be exempt. The government wanted this to be exempt.

Typically, in the older days, we would say, okay, we will go back to headquarters and consult and get back to you.

The team did not just rely on their own instincts. They used e-mail to send a message to their community of practice. Within 72 hours, they got a lot of feedback from different parts of the world; bank staff, even non-bank staff who are part of the network -- even somebody who was retired.

So all of this institutional knowledge that remains between our ears was tapped, ultimately, for the benefit of good advice to our counterparts. So, within 72 hours, this team was able to formulate a position. And it happened to be a position that was different from what their instincts were. So leveraging the knowledge of the institution improved the quality of the service that you gave your client.

## Appendix H (Albania)

## Oral Story

In October, 1999, one of our staff in the resident mission in Albania was actually really looking for help. He had just received a very urgent request from the Minister of Education in Albania and the Minister was trying to identify some good education development plans for the country, as a whole. The staff, actually, was not residing in Albania but he was there for a mission for about two weeks. And he was really trying to get back to the Minister with some recommendation as to how to go about that. That question came to us, to the advisory services very quickly through e-mail. Within about 48 hours, there was a number of people who had been consulted and asking whether they could find some good examples of -- A number of answers came back from a number of countries. Some of that was made available immediately to the mission. The staff who was one of the most experienced staff in the sector was able to have access to some very good recommendation, an example coming from the community. Again, what happened during that mission was very different than what would typically happen at the bank. The typical answer to a question coming from a minister would be, "Well, we'll have to look into that and we'll send a mission, we'll do a review, and we'll study the question." In that case, what happened was very different. There were some actual examples of countries and how they structured their education plans, which was made available to the minister within that mission.

## Appendix I: Storyteller 1

And so 97M -#-\$  
that they were able to then move 98  
forward, um with the new loan for this 99 |  
new technology. So using that kind of 100 -\$  
a story, people would say oh that's, 101 -#  
oh but we do that, and they say oh but 102 |  
we do that all the time, we talk to 103 |  
each other. Whereas when we were 104 -#  
talking about Knowledge Management it 105  
was seen as some mystical thing that 106  
... did or the IT people did. 107  
So once you put it in the context as 108M -#  
here is an example and it's a real 109 |  
example, they got it. And that's what 110 -#  
we started to see instead of the blank 111  
gazed look that says yea, yea, yea, 112  
another presentation another power 113M  
point slide after slide. People came 114 -#  
to life, and you know um, started to 115 |  
tell their own stories, "well we've 116 |  
done some of that in say in Health or 117 |  
Education or wherever it happened to 118 |  
be. 119 -#

STORYTELLER 1: Um, I have to think back. It 129  
would be more along the lines of well 130  
we've done something like that, or yes 131M -#  
we also have a group of people, we've 132 |  
already formed our community of 133 |  
practice, its just not called that. 134M -#  
Um, so basically people would then 135 -#  
begin to understand, I mean that's 136 |-\$  
what we were really aiming at, that 137 ||  
the people would understand what we 138 |-\$  
were talking about and that it 139 |  
wouldn't seem so foreign. And I think 140 -#  
that the questions and comments showed 141  
that they were actually um, realizing 142  
that I can share my knowledge with 143  
you, I don't have to learn a new 144  
technology, I don't have to go and do 145  
something else that's different. 146

STORYTELLER 1: Well, it's actually not that 202 -#

|  |      |     |    |
|--|------|-----|----|
| easy to find. We would go out to out   | 203  | -   | \$ |
| thematic groups, and we have 114 of    | 204  | -   | \$ |
| them. And say we need a current        | 205  | -#- | \$ |
| story. Right now, we're doing it       | 206  |     |    |
| right now but I know you are           | 207  |     |    |
| interested in way back then. Um, and   | 208  | -#- | \$ |
| people, nobody likes to write um so we | 209  |     |    |
| would ask and we will send you         | 210  |     |    |
| somebody who can come and talk to you  | 211  |     |    |
| and try and write it down. And I did   | 212  | -#  |    |
| it a little bit of that too. And then  | 213  |     |    |
| we got some students to come and I     | 214  |     |    |
| think they collected about 20 to 25    | 215  | -#  |    |
| stories by going to the thematic       | 216  |     |    |
| groups. And we also have advisory      | 217  | -#- | \$ |
| services like a help desk in a subject | 218  |     |    |
| like education, or poverty, gender, or | 219  |     |    |
| something like that. Um, and they are  | 220  | -\$ |    |
| the ones who also see these kind of    | 221  |     |    |
| questions or help the Minister of      | 222  |     |    |
| Finance to know something. I need      | 223  |     |    |
| this to satisfy the Minister of        | 224  |     |    |
| Education, or you know, they were real | 225  | -#  |    |
| life stories of people in the field    | 226  |     |    |
| dealing with the client who needed a   | 227  |     |    |
| quick answer to a problem.             | 228  | -#  |    |
| <br>                                   |      |     |    |
| Um, if you took                        | 256  | -#  |    |
| a very real problem that staff would   | 257  |     |    |
| resonate with, so here is your, the    | 258  |     |    |
| task manager, most people have been in | 259  |     |    |
| that situation out somewhere in the    | 260  |     |    |
| country. So you so you can say okay,   | 261  | -#  |    |
| Pakistan is over there or Malawi is    | 262  |     |    |
| over there, or whatever. And, here     | 263  | -#  |    |
| you are faced with a Minister who      | 264  |     |    |
| wants an answer and you're there       | 265  |     |    |
| representing the bank. You're          | 266  |     |    |
| supposed to know, we're hired because  | 267  |     |    |
| we know we're the subject experts.     | 268  |     |    |
| And all of sudden here comes something | 269  |     |    |
| that isn't something that we've dealt  | 270  |     |    |
| with in the past. Um, the              | 271M | -#- | \$ |
| organization at the time was down      | 272  |     |    |
| sizing so looking for people to get    | 273  |     |    |
| rid of, and now you're going to say,   | 274  |     |    |

|  |      |       |
|--|------|-------|
| “I don't know the answer to that       | 275  |       |
| question”, you're not really going to  | 276  |       |
| say that. But in your community of     | 277  | -\$   |
| practice you can say that because they | 278  |       |
| don't look at it as I don't know the   | 279  |       |
| answer. It's, here is another problem  | 280  | -#    |
| that is different that what we've      | 281M |       |
| normally dealt with. And who's got     | 282  | -#    |
| experience in dealing with this kind   | 283  |       |
| of problem. The fact that a peer to    | 284  | -#    |
| peer assisting one another. Um, and    | 285  | -#    |
| so with the case of, in a way we       | 286  |       |
| started to fall over that sort of      | 287M |       |
| thing. The Roads and Highways were     | 288  | -#    |
| the first group that we found who      | 289  |       |
| initially weren't keen on joining this | 290  |       |
| whole knowledge movement because they  | 291  |       |
| were a very established group. Um,     | 292  | -#-\$ |
| had distribution lists, they had a     | 293  |       |
| website, they had external partners,   | 294  |       |
| and we kept saying but you're a living | 295  |       |
| proof of what we want to do, we want   | 296  |       |
| everybody to work this way. So we      | 297  | -#-\$ |
| worked with them and that's how we got | 298  |       |
| that one story. We started to tell it  | 299M | -#-\$ |
| and then somebody would say well you   | 300  |       |
| know we did something like that in tax | 301  |       |
| in Madagascar. So, you know, Dennis    | 302  | -\$   |
| would ask the questions, they'd send   | 303M | -#    |
| us some details and he'd sort of pair  | 304M |       |
| it down to the essential elements. And | 305  | -#-\$ |
| what we really wanted to show, if you  | 306  |       |
| think of the goal, was to show this    | 307  |       |
| openness, to asking questions, to      | 308  |       |
| sharing knowledge, um to getting       | 309  |       |
| answers for clients and having         | 310  |       |
| external partners. You have to have    | 311  |       |
| those sort of components in it. Um,    | 312M | -#-\$ |
| then it wasn't to difficult to, to     | 313  |       |
| prompt for that information. Um, and   | 314  |       |
| then if the story showed that you know | 315  |       |
| if we were organized we could have our | 316  |       |
| communities, we could organize the     | 317  |       |
| responses to questions like that, then | 318  |       |
| it didn't matter whether you were in   | 319  |       |
| Health or Roads or whatever, um it     | 320  |       |

|  |      |       |
|--|------|-------|
| would work. So it had to be a story                | 321M | -#-\$ |
| that was about bank work, it didn't                | 322  |       |
| have to be um, I mean that was the                 | 323  |       |
| main question. It had to be about                  | 324  |       |
| bank work. So that people could say                | 325  |       |
| “yeah we could do that”.                           | 326  | -\$   |
| <br>Interviewer: So you worked with collecting     | 328  |       |
| the stories, was it Dennis who                     | 329  |       |
| collected the stories, he, it sounds               | 330  |       |
| like he put them together.                         | 331  |       |
| <br>STORYTELLER 1: He put them together, he is the | 333  |       |
| one who really founded this work. I                | 334  | -#    |
| mean initially I just thought these                | 335  |       |
| were examples and it made sense. But               | 336  | -#    |
| he really began to see that when he,               | 337  |       |
| when he started with the definitions               | 338  |       |
| and the charts of this is what                     | 339  |       |
| Knowledge Management is, this is what              | 340  |       |
| it's about, this is what we're going               | 341  |       |
| to do, I'm going to build a website.               | 342  |       |
| I'm going to build databases and you               | 343  |       |
| know people were saying why am I                   | 344  |       |
| sitting here, I've got other things to             | 345  |       |
| do. But if you said, here is an                    | 346  | -#    |
| example this is a true story, it                   | 347  |       |
| <br>Um, so gaining that support made it            | 457M | -#    |
| very easy, you know I had that support             | 458  |       |
| before because I had all his slides                | 459  |       |
| and I heard him tell it. So I knew                 | 460  | -#    |
| the story and then be he was, you                  | 461  |       |
| know, sitting there, rubbing his head              | 462  |       |
| giving me the non verbal and                       | 463  |       |
| afterwards was very very supportive.               | 464M |       |
| So from then on it became very easy.               | 465  | -#    |
| Um, and so there were a couple of                  | 466  |       |
| stories and I think that we boiled                 | 467  |       |
| them down from about ten, down to                  | 468  |       |
| maybe one or two that we use all the               | 469  |       |
| time. And then you can hear other                  | 470  | -#-\$ |
| people in the bank telling them. Um,               | 471  | -\$   |
| and with Dennis actually tells a funny             | 472  |       |
| story about that and you'll probably               | 473  |       |
| get that when you interview him. But               | 474  |       |

|  |            |
|--|------------|
| this Pakistan story is what he told it       | 475        |
| to the President and several other           | 476        |
| people. And anyways at some other            | 477        |
| meeting and he can give you the              | 478        |
| details of that. Where somebody else         | 479 -#     |
| told the Pakistan story and the              | 480        |
| President got up and said no that's          | 481        |
| wrong. You didn't tell it right. Um          | 482        |
| because the guy had just told it as a        | 483        |
| matter of fact kind of story. And the        | 484        |
| President got up and he told it with         | 485        |
| passion and that's the thing, people         | 486        |
| are passionate about their work. And         | 487 -#-\$  |
| they are passionate about getting the        | 488        |
| responses for the client. And so the         | 489        |
| story has to be told with passion and        | 490        |
| the President didn't like the fact           | 491        |
| that this guy had just told it as a          | 492        |
| boring story so he told it again. And        | 493 -\$    |
| I think that's been fun seeing the           | 494        |
| story being corrected.                       | 495        |
| <br>   |            |
| Interviewer: Do you think that you tell the  | 497        |
| stories with passion?                        | 498        |
| <br>   |            |
| STORYTELLER 1: People tell me I do. Um, they | 500M -#    |
| say they can sort of see this person         | 501 !      |
| and they can resonate. Gosh you know         | 502 -#-\$  |
| I've been in a situation with a client       | 503        |
| whatever your client may be where I'd        | 504        |
| wished I knew the answers. And if            | 505M -#-\$ |
| only I could have had that, you know,        | 506        |
| I'll get back to you a two days, I'll        | 507 -#     |
| consult my colleagues, if not I'll           | 508        |
| have to go back to Washington and            | 509        |
| commission a study and in six months,        | 510        |
| we'll give you the answer. Um, so I          | 511        |
| hope I still have the passion.               | 512        |
| <br>   |            |
| Interviewer: What do you, I understand that  | 515        |
| not everybody buys into this                 | 516        |
| initiative, that's what I've                 | 517        |
| heard, so how do you walk away from a        | 518        |
| presentation, after having presented         | 519        |
| using story, how do you feel when you        | 520        |
| walk away? Let me more specifically          | 521        |

|  |         |
|--|---------|
| say, how, have you been in a instance    | 522     |
| where you felt like they weren't         | 523     |
| interested versus have you been in a     | 524     |
| situation where it was overwhelmingly    | 525     |
| accepted.                                | 526     |
| <br>                                     |         |
| STORYTELLER 1: In a group situation it's | 528M -# |
| always been accepted. Uh, maybe one      | 529     |
| or two people didn't accept it but       | 530     |
| they didn't come and say that's          | 531     |
| rubbish. They might have left. Um,       | 532 -#  |
| but I wouldn't have known that. And      | 533     |
| mostly in a one on one situation I've    | 534     |
| not had a problem either. Where I've     | 535     |
| had had a problem is if there was a      | 536 -#  |
| roads person sitting there you know      | 537     |
| who'd start criticizing, you know if     | 538     |
| it was a one on one well I'm a road      | 539     |
| specialist, now what is this? Well I     | 540 -#  |
| haven't a clue, I don't know from like   | 541     |
| -----surfaces or concrete                | 542     |
| surfaces. Um, so in that situation       | 543     |
| I've had to say look, the technology     | 544 -#  |
| isn't the point, the point is that       | 545     |
| here is this community of practice       | 546     |
| that very quickly can help you get the   | 547     |
| answer to the problem                    | 548     |

## Appendix J: Storyteller 2

|   |             |
|---|-------------|
| So it was not                           | 105         |
| like we had a very clear vision --      | 106         |
| well, vision, maybe -- but a very       | 107         |
| clear blueprint on how it's going to    | 108         |
| be organized. And the name of the       | 109 -#      |
| game was to present it to the rest of   | 110M        |
| the bank. It was both to, over time,    | 111         |
| design; to have a sort of clear idea    | 112         |
| of how, you know, things would be       | 113         |
| simple -- could be designed; and        | 114         |
| communicate that as we go. It's         | 115 -#      |
| important, again, because if you have   | 116         |
| a very clear product or service or      | 117         |
| program and you have to communicate,    | 118         |
| well, that's easy. You know that you    | 119         |
| have to start with that. In our case,   | 120 -#      |
| the whole implementation was -- you     | 121         |
| know, we didn't know exactly what we    | 122         |
| were doing. We invented the model as    | 123         |
| we went. That's a very important        | 124         |
| distinction to make. When we talk       | 125 -#-\$-% |
| about communication, now, it was        | 126         |
| communication about a story which was   | 127         |
| evolving very fast. The whole idea      | 128         |
| about implementing knowledge            | 129         |
| management and the way we were going    | 130         |
| about it was actually changing very     | 131         |
| fast based on the earlier results we    | 132         |
| got, how people were responding to the  | 133         |
| design. So it was adjusted all the      | 134         |
| time. So, again, your question about    | 135         |
| presentation was what was my role in    | 136         |
| terms of --                             | 137         |
| INTERVIEWER: When you come to the       | 138         |
| presentation, what was your role in     | 139         |
| the actual presentation? We know that   | 140         |
| you shared some information about this  | 141         |
| whole initiative. How did that          | 142         |
| happen?                                 | 143         |
| <br>                                    |             |
| Probably started to use that at the     | 272         |
| end of 1998, I suppose. Although,       | 273         |
| again, I don't have the exact date.     | 274         |
| INTERVIEWER: Can you describe to me how | 275         |
| that happened; that you started using   | 276         |

|   |            |
|---|------------|
| your stories? Describe what happened,   | 277        |
| how you went about creating these.      | 278        |
| STORYTELLER 2: Right. Well, I guess the | 279M -#    |
| reason why we started to use them is    | 280        |
| because they were success stories, in   | 281        |
| a sense. There were specific            | 282M -#-\$ |
| instances where, because of having a    | 283        |
| network of professionals organizing     | 284        |
| communities and organizing with the     | 285        |
| Education Advisory Services, we were    | 286        |
| able to answer questions or to connect  | 287        |
| people much more quickly. These were    | 288        |
| sort of early successes of the          | 289        |
| implementation of the knowledge         | 290        |
| management system, so it would only     | 291        |
| make sense that we would use those      | 292        |
| stories, and also because we were       | 293        |
| pretty happy about having the evidence  | 294        |
| that something was happening. Most of   | 295 -\$    |
| the time, what was happening was that,  | 296 -#     |
| you know, there would be an element of  | 297        |
| speed in answering the questions or in  | 298        |
| connecting people with the type of      | 299        |
| information or knowledge that they      | 300        |
| were looking for. So that element of    | 301M -#-\$ |
| success that we were sort of really     | 302        |
| looking for -- because, you know, when  | 303 -\$    |
| you are implementing a program and      | 304        |
| people are highly skeptical, which was  | 305        |
| the case back in those years, and       | 306        |
| folks were really against us -- having  | 307M -#    |
| some stories coming from the ranks of   | 308        |
| the education professionals,            | 309        |
| themselves, was pretty powerful for     | 310        |
| alerting them that something was        | 311        |
| happening. So I guess that's the        | 312 -#     |
| reason. How did we get these stories?   | 313        |
| Simply -- and that's something that     | 314        |
| you will need to discuss in length      | 315        |
| with Mary (indiscernible) who was       | 316        |
| managing the -- They had a tracking     | 317 -#     |
| system, so they knew exactly the type   | 318        |
| of question which was coming. They      | 319        |
| knew, also -- they were tracking the    | 320        |
| various answers coming in to a          | 321        |
| question, coming from different people  | 322        |

within the networks or within the 323 |  
 communities of practice. So they had 324 |  
 actually a record of all of the 325 |  
 (indiscernible) which would come along 326 |  
 with a specific question. So it was 327 -#-\$  
 actually pretty easy to track and to 328 |  
 reconstitute a story, from the 329M -#-\$  
 question which comes from someone in 330 |  
 the bank or outside the bank, to who 331 |  
 are the people involved in providing 332 |  
 part of the answer, to the final 333 |  
 answer which was given to the client 334 |  
 with some level of synthesis and 335 |  
 integration and so forth, and even to 336 |  
 the feedback from the user; you know, 337 |  
 the person who asked the question 338 -#-\$  
 coming back and saying, "Wow, this is 339M |  
 terrific. I got all of that" -- it 340 |  
 sounds like a commercial -- "I got all 341 |  
 of this in a couple of days and thank 342 -\$  
 you very much." So all of that was 343 |  
 struck in the system and that's how 344 |  
 Mary -- and, again, that's something 345 |  
 to probe with her -- would actually be 346 |  
 able to write a story with a lot of 347 |  
 specifics as to what had happened and 348 |  
 how it had been done and what was the 349 |  
 outcome. 350 |  
 INTERVIEWER: Was it your decision? 351 |  
 STORYTELLER 2: Yeah, it was a decision 352 |  
 a joint decision of Mary and -- And, 353 |  
 basically, we are looking for, again, 354 -#  
 evidence of something different taking 355 |  
 place. And the criteria might be that 356 |  
 the answer and the people who were 357 |  
 connected through the answer -- 358 -#  
 INTERVIEWER: Through the answer? 359 |  
 STORYTELLER 2: Well, the person who asked 360 -#  
 the question and the very people who 361 |  
 contributed to a part of the answer, 362 |  
 being located in very different 363 |  
 locations. So we would be always 364 |  
 interested in something -- so that 365 |  
 might be one criteria; to have -- to 366 |  
 show the power of networking and 367 |  
 connections. And, although the 368 |

criteria was to link it to our country 369 |  
 clients and to something which was 370 |  
 linked to, you know, our country 371 |  
 client. In other words, if it is a 372 -#-\$  
 question of only bank stuff -- being 373 |  
 able, very quickly, through the 374 |  
 network -- which happened all the 375 |  
 time, by the way -- to find an answer 376 |  
 to the question, it is interesting, 377 |  
 but to a point. If the question is 378 -#-\$  
 coming from the field from another 379 |  
 country, country offices and so forth, 380 |  
 because of the involvement of the 381 |  
 client, then things become much more 382 |  
 interesting. So I guess the criteria 383 -#-\$  
 was -- another criteria had to do with 384 |  
 something which involved the client -- 385 |  
 and by "client," we mean the 386 |  
 countries. And, probably, another 387 -\$  
 criteria was to have that link to the 388 -#-\$  
 operation, to the bank operation. So, 389 -# |  
 in other words, there is a project 390 |  
 which is being prepared in that 391 |  
 country and people are looking for 392 |  
 some knowledge or information which 393 |  
 will help them design better that 394 |  
 program. Then there is a connection to 395 |  
 the core business of the bank, which 396 |  
 is operations. So I guess we would be 397 -\$  
 looking for all of these elements, all 398 |  
 this criteria. Of course, we were 399 -#  
 looking for satisfactory resolutions, 400 |  
 success of the story, so that we were 401 |  
 able to -- I guess we may also have 402 -#  
 been looking for the credibility of 403 |  
 the staff involved in that 404 |  
 intervention. In other words, if it 405 -#  
 is a staff who is pretty well-known by 406 |  
 the community and so forth, that's 407 |  
 even better because he or she is 408 |  
 pretty representative of that network 409 |  
 of staff. So all of that may have been 410 -#-\$  
 factors in trying to identify the 411 |  
 right stories. But it was not very 412 |  
 difficult to identify. They would 413 -\$  
 literally jump at you. You would know 414 |

that. And there we (indiscernible) 415  
credit to Dennis to be constantly 416 -#  
looking out for interesting stories 417 |  
because we became also interested in 418 |  
that. So we would look at some of the 419 -#  
questions and then, as I said, they 420  
would jump at you because they were 421  
interesting questions -- well, that 422  
may be also a criteria. 423

INTERVIEWER: When you say "They would 424  
jump at you," can you use an example 425  
of what might have caught your 426  
interest? 427

STORYTELLER 2: Well, I can give you 428  
specific stories, and I'm happy to 429  
share that with you. But what I mean 430 -#  
is that we wouldn't have to, like -- 431 |  
to argue for a long time about what 432 |  
are some interesting stories to talk 433 |  
about because you would just look at 434 |  
that and say, "Wow. Yes." I mean, the 435 |  
question is coming from a country 436 |  
(indiscernible) fighting, involved a 437 -#  
lot of people, everybody contributed. 438  
In the end, there was a decent sort of 439  
answer and body of knowledge around 440  
that question and the client was 441  
really satisfied. I mean, you would 442  
see that very quickly. And I'll give 443  
you some specifics. And, also, let me 444  
mention something that is interesting. 445  
As I mentioned to you, the advisory 446  
service was (indiscernible) those 447  
advisory service served that function 448  
of being the central node of the 449  
knowledge management system. 450

And then it gets 767 |  
us into some specialized institutions, 768 |  
adult learning and so forth, in the 769 |  
U.S. So it would take a little bit 770 |  
more. In fact, when you will see the 771 -#  
slide -- because Mary will show you 772  
the slide that's part of the advisory 773  
service -- It's a little bit dense as a 774  
slide. It's a little bit complex. In 775

fact, I was -- you know, when we were 776  
 sort of looking at that, I was 777  
 suggesting to Mary that she 778  
 simplifies that because it has to be 779  
 -- the story that we are trying to 780 -#  
 tell has to captivate the imagination 781 |  
 of people but it has to be easily 782 |  
 understood. Typically, in those 783 -#  
 presentations, you have got a large 784  
 number of people, and they may or may 785  
 not know about the complex (sic) and 786  
 so forth. So you need something which 787  
 will be understood by a large group, 788  
 with people having different 789  
 backgrounds and having been exposed to 790  
 different situations-- the, probably, 791  
 dimension of stories, that they have 792 -#  
 to be interesting and inspiring, 793 |  
 captivating, and so forth. But they 794 |  
 have to be easily understood, 795 -#  
 otherwise you're going to lose your 796  
 audience -- 797  
 INTERVIEWER: What do you think happened 798  
 when you told the stories to the 799 -#  
 groups of people you presented to? 800 |  
 STORYTELLER 2: -- these instances where 801 -#  
 people -- you know, you can't 802  
 represent that as (indiscernible) or 803  
 something like that. But I think, 804  
 really, that's what it is. It's some 805 -#  
 kind of revelation. It's "Ah-ha. 806 |  
 That's what you guys are talking 807 |  
 about." I'm sure people have expressed 808 |  
 that, or "This is what I have 809 |  
 understood." I cannot tell you 810 -#  
 whether it has been verbalized, as 811  
 such, to me. But I think, really, 812 -#  
 that's what I understood because it 813 |  
 would take people away from thinking 814 |  
 about what they perceive as negative 815 |  
 things about this whole thing about 816 |  
 knowledge management: A, that it was 817 -#  
 a fad -- it was the latest fad by the 818  
 management; B, that it was about 819  
 technology; C, that it was pushed by 820  
 management from the top. There were a 821 -#

|   |  |
|---|--|
| lot of antibodies about knowledge management at that time.  | 822  <br>823 -#  |
| INTERVIEWER: What clues were given to you?  | 895<br>896   |
| STORYTELLER 2: That they would react like that?   | 897<br>898   |
| INTERVIEWER: Uh-huh.  | 899  |
| STORYTELLER 2: Well, one thing I know for sure is that, many, many times over, people would come and say, "You know, that story about Nepal" or whatever, "that's pretty powerful stuff." That comment, I get that many, many times over--how people react and so forth. And you can sense when you are really captivating the attention of people; that people really become very interested. You can also tell when you are losing them. So, when I look back at my presentation, I can see that there is a whole part of the presentation which is theoretical; what is the vision of knowledge management, how is the knowledge management organized, what do we call communities of practice, what kind of technology platform are we using. All of that is pretty theoretical. Then you come to a part where, you know, as I said, it is a live example of life -- or a real example of something which involves the client and which is very close to the real life of task managers or operations --as a presenter, you -- very attentive -- not losing anybody. People are really into it. You can tell. | 900<br>901<br>902 -#<br>903  <br>904 -#<br>905<br>906<br>907 -#<br>908  <br>909  <br>910 -#<br>911<br>912<br>913<br>914<br>915<br>916<br>917<br>918<br>919<br>920<br>921<br>922 -#<br>923  <br>924  <br>925  <br>926 -#<br>927<br>928<br>929 |
| INTERVIEWER: Anything come to mind that you observed?   | 930<br>931   |
| STORYTELLER 2: What comes to mind, yes, is the intensity of attention --typically before you present in power point presentation --There is an intensity there. And then you get people who come and make some comments   | 932<br>933<br>934<br>935<br>936<br>937   |

|  |           |
|--|-----------|
| and say, "Well, a good presentation,"    | 938       |
| blah, blah, blah.                        | 939       |
| I was not totally                        | 966       |
| understanding or not totally paying      | 967       |
| attention because I really think that    | 968       |
| there is something here and that we      | 969       |
| all need to pay attention to that."      | 970       |
| So it was like a convert who is          | 971       |
| actually making a public statement in    | 972       |
| front of his staff, that he may not      | 973       |
| have been very interested, but he        | 974       |
| thought that it was something really     | 975       |
| --On the personal level, that was        | 976       |
| interesting because he was my boss,      | 977       |
| before, and I knew he was always a bit   | 978       |
| reluctant to innovation and so forth.    | 979       |
| But that happened. I wouldn't be         | 980       |
| surprised if this story had a very       | 981       |
| large part.                              | 982       |
| And I guess the fact that a lot of other | 1016      |
| stories were not selected is because,    | 1017      |
| probably, they were complex or we        | 1018      |
| didn't feel that -- you know, they       | 1019      |
| were missing some elements or they       | 1020      |
| were not sort of representative of the   | 1021      |
| whole thing or maybe they were too       | 1022      |
| difficult. So there are a lot of         | 1023      |
| stories we didn't use, and we used       | 1024      |
| some. And few stories -- here is the     | 1025      |
| point. We used few of them, and maybe    | 1026 -#   |
| few of them because it is an             | 1027      |
| investment, actually, in capturing       | 1028      |
| your story and writing it and telling    | 1029      |
| it and so forth. The stories don't       | 1030      |
| come to you naturally. It's like best    | 1031  -\$ |
| practices. You can send an e-mail and    | 1032 -#   |
| say to people, "We would like to have    | 1033      |
| some good practices," and, you know,     | 1034      |
| most of the time, of course you are      | 1035      |
| not going to get anything. And that's    | 1036 -\$  |
| a big part of knowledge management;      | 1037      |
| there is always some intermediation.     | 1038      |
| You have to go to people and say, "I     | 1039 -#   |
| know you have been involved with that    | 1040      |

project and can we write it up for 1041 |  
you" or something like that. Same 1042 |  
thing with the story. And that's what 1043 |  
Dennis was doing very effectively, 1044 |  
going around the bank, listening and 1045 |  
then saying, "That was pretty 1046 |  
interesting. Why don't we write it 1047M -#  
up." But the point I'm making here is 1048 -#  
that it's stories -- it's 1049 |  
(indiscernible) intensive to identify 1050 |  
a story, to write one, get it wrote -- 1051 |  
write a story or express it in slides 1052 |  
and be able to use it. So, I think, in 1053 -#-\$  
the end, my sense is that we have used 1054 |  
few stories -- and I know that 1055 -\$  
because, right now, I'm sort of 1056  
launching a full range of capturing 1057  
new stories because we have not 1058  
replenished the stock. 1059

## Appendix K: Storyteller 3

|  |           |
|--|-----------|
| INTERVIEWER: Why did you do that?      | 135       |
| Why did you make that transition?      | 136       |
| STORYTELLER 3: First, because Dennis   | 137       |
| discovered early on that it was much   | 138       |
| more effective to tell a story than to | 139 #     |
| use charts and graphs and numbers.     | 140       |
| You can incorporate them.              | 141-#     |
| But he had a very clever power point   | 142       |
| presentation where he does a matrix    | 143       |
| and then figures in charts, and then   | 144       |
| he shows his audience where their eyes | 145       |
| are sort of in spirals, glazed-        | 146       |
| over-sort of a thing. He caught on     | 147       |
| fairly quickly to that.                | 148       |
| Then we emulated them. And he did      | 149#      |
| wonderful power point presentations    | 150       |
| sort of as a tool for his stories, and | 151-#     |
| we used them, as well. We would cut    | 152       |
| and paste and so on. When I say "we,"  | 153       |
| the rest of the team, when we were --  | 154       |
| well, we were. It was very much --     | 155       |
| our job was to propagate the idea of   | 156       |
| knowledge management, to disseminate   | 157       |
| it among staff, to show how it was     | 158       |
| done.                                  | 159       |
| We'd do a lot of these. There were     | 160       |
| a lot of these things going on. At     | 161M      |
| one point, it got to the point where I | 162       |
| realized that it was just as easy to   | 163 -#    |
| just tell the story; you didn't need   | 164 -#    |
| to have the nice power point -- it     | 165 -#    |
| helps. But if you can tell a story     | 166 -#-\$ |
| with some feeling, if you're           | 167       |
| articulate and so on, you'll find that | 168 -\$   |
| audiences respond very well to the     | 169 -#    |
| storytelling as opposed to more formal | 170 -#    |
| presentations or reading a paper and   | 171       |
| that sort of thing.                    | 172       |
| I've never read -- and I give many     | 173       |
| presentations to different audiences   | 174       |
| in different places and, at most, I    | 175       |
| will use bullet points just to have my | 176       |
| ideas down.                            | 177       |
| But I find it so much more -- and,     | 178       |
| then, of course, they come and ask me  | 179 -#    |

|  |           |
|--|-----------|
| for a copy of the paper. Well, there   | 180       |
| ain't one.                             | 181 -#    |
| But, anyway, that's a little bit how   | 182       |
| we used it.                            | 183       |
| <br>                                   |           |
| So that story, I think, makes a very   | 265       |
| good point of the power of the         | 266       |
| thematic groups.                       | 267       |
| INTERVIEWER: And that's about how      | 268       |
| you would tell it?                     | 269       |
| STORYTELLER 3: And that's how I'd      | 270       |
| tell it. And if you have the details,  | 271 -#    |
| you know, to make it more personal;    | 272 -#    |
| the professor in the university in     | 273       |
| Ottawa or wherever it was in Canada,   | 274       |
| and if you explain that the task team  | 275 -#    |
| leader was under a lot of pressure and | 276       |
| that he really needed to get this      | 277       |
| done. First, you add that to give it   | 278 -#-\$ |
| a sort of context and a feel for it,   | 279       |
| so that people can identify with it.   | 280 -\$   |
| Then you draw lessons from it. I       | 281 -#    |
| find it's a terribly effective way to  | 282       |
| convey experiences and information.    | 283 -#    |
| INTERVIEWER: You said you draw         | 284       |
| lessons from it. Talk to me about      | 285       |
| that.                                  | 286       |
| STORYTELLER 3: "Draw lessons," I       | 287       |
| mean, point out to the audience the    | 288       |
| lessons in the story.                  | 289       |
| INTERVIEWER: And what might be         | 290       |
| those here?                            | 291       |
| STORYTELLER 3: In this case was that   | 292       |
| a change in behavior in bank staff --  | 293       |
| in the past, it was not acceptable to  | 294 -#    |
| say that you don't know something in   | 295       |
| the bank. It really wasn't. It was     | 296       |
| just a paradigm.                       | 297 -#    |
| With knowledge management, it's not    | 298       |
| only acceptable, we do it on a very    | 299       |
| regular basis. We'll send out an       | 300       |
| e-mail, "Does anybody know." We'll     | 301 -#    |
| ask. We'll admit, "I really don't      | 302       |
| know but I'll find out."               | 303       |
| That change in paradigm, if you        | 304 -#    |
| like, in the social behavior, and      | 305       |

|  |           |
|--|-----------|
| understanding of how knowledge         | 306       |
| management can help us has very        | 307       |
| concrete, practical results, as in     | 308       |
| this story.                            | 309       |
| In other words, we got an answer to    | 310 !-#   |
| the Minister on the spot. We were      | 311 -#-\$ |
| able to incorporate it to the project  | 312       |
| that was being appraised at the time.  | 313 -\$   |
| And they came back with a totally      | 314 -#    |
| different thing than they had expected | 315       |
| when they went out.                    | 316 -#    |
| That's the power of sharing            | 317       |
| knowledge through thematic groups.     | 318       |
| That's one lesson. the other lesson,   | 319       |
| I think, is that knowledge is shared   | 320 -#    |
| best among communities of practice;    | 321       |
| people who have the same passions, who | 322 -#-\$ |
| share the same problems or deal with   | 323       |
| the same issues. And this is a good    | 324       |
| example.                               | 325 -\$   |
| <br>                                   |           |
| INTERVIEWER: How can you tell          | 357       |
| they're excited?                       | 358       |
| STORYTELLER 3: That's a good           | 359       |
| question.                              | 360       |
| How can you tell they're bored? If     | 361       |
| they're, like, indifferent. If         | 362       |
| they're looking at their watches,      | 363       |
| waiting to get out.                    | 364       |
| You can tell they're excited if        | 365       |
| there are a lot of hands going up, if  | 366       |
| you're running past the allotted time  | 367       |
| and nobody is complaining or saying    | 368       |
| anything. That's how you know if       | 369       |
| you're on the right track, if you're   | 370       |
| using the right approach.              | 371       |
| I find that works extraordinarily      | 372       |
| well; to tell stories rather than just | 373       |
| to relate, say, a dry case study or to | 374       |
| read a very prepared, formal           | 375       |
| presentation sort of a thing.          | 376       |
| <br>                                   |           |
| INTERVIEWER: What makes you want to    | 415       |
| listen to a story?                     | 416       |
| STORYTELLER 3: Well, I think the       | 417       |
| common denominator is you can always   | 418       |

|  |        |
|--|--------|
| relate to the story, somehow or        | 419 -# |
| another.                               | 420 -# |
| When we tell it to task teams and      | 421    |
| we're talking to bank staff, and tell  | 422    |
| how this task manager was under        | 423 -# |
| pressure, was under the gun, there was | 424 -# |
| something they didn't know, all his    | 425    |
| members of his team really didn't know | 426    |
| how to handle this issue, what had     | 427    |
| been done, what had been the results,  | 428    |
| you immediately have the empathy of    | 429 -# |
| your audience. They know exactly what  | 430    |
| you're talking about; to be under that | 431    |
| pressure, to not know the answer.      | 432 -# |
| They're, then, perhaps, readier for    | 433    |
| your proposed solution. You say, "The  | 434    |
| solution is to work as a community of  | 435    |
| practice, to share knowledge, to ask   | 436    |
| questions."                            | 437    |
| INTERVIEWER: You said that you, in     | 438    |
| the beginning, went around and talked  | 439    |
| to the different thematic groups to    | 440    |
| get information to create these        | 441    |
| stories; is that right?                | 442    |
| <br>                                   |        |
| INTERVIEWER: Describe to me what       | 503    |
| you thought was important to say.      | 504    |
| STORYTELLER 3: In these stories, in    | 505    |
| particular?                            | 506    |
| INTERVIEWER: You said situation.       | 507    |
| STORYTELLER 3: I think it was more --  | 508    |
| I don't know if I would answer "what   | 509    |
| was important to say" but -- I'm       | 510    |
| trying to think of this. Because, by   | 511    |
| the time we got it, it wasn't the      | 512    |
| exact words. We'd tell them, "We want  | 513    |
| you to go get this." They go and       | 514    |
| interview somebody and they say,       | 515    |
| "Well, we think this is a knowledge    | 516    |
| management story." They give it to     | 517    |
| us.                                    | 518    |
| We, then, would take some of them      | 519    |
| and put them in brochures, such as     | 520    |
| this, and we use them in our talks,    | 521    |
| later on.                              | 522    |
| And, again, they always referred to,   | 523 -# |

as I say, situations where a new -- 524 |  
there's no paradigm, there's no 525 |  
approach to how we do business, which 526 |  
is sharing knowledge -- can help solve 527 |  
problems: we can do things quicker, 528 |  
better, faster, cheaper, if you use 529 |  
knowledge management. That's the 530 |  
message that we're trying to get 531 |  
across as to why you want to be doing 532 |  
this. 533 -#  
INTERVIEWER: How did you select the 534  
story to use in any presentation that 535  
you did? 536  
STORYTELLER 3: That's a good 537  
question. 538  
Because I mentioned the one -- but 539 -#  
there are several cases; one on 540 |  
educational reform, another on road 541 |  
maintenance. I don't know. I think 542 -#  
what we were looking for was a story 543  
that showed the different parts of 544  
knowledge management and the benefits 545  
of it. 546  
So, sharing is one part. Community 547 -#  
of practice is another part. And 548 -#  
being more responsive to your clients 549  
is a third part. 550  
So you can have a story that has two 551  
of these elements. If it has all 552  
three, it's a much better story in 553  
terms of the message you're trying to 554  
get across. 555

INTERVIEWER: Do you ever share more 883  
than one story in a presentation? 884  
STORYTELLER 3: Oh, absolutely. 885  
Absolutely. 886  
INTERVIEWER: And is it based on 887  
what you find out when you get there 888  
or do you come with, like, a -- 889  
STORYTELLER 3: No. Very frequently, 890  
it will be in the question and 891  
answers: "Well, why is that so?" And 892  
that can happen in a presentation. It 893  
can happen over the phone in a 894  
one-on-one conversation. 895

|  |     |
|--|-----|
| I found myself telling a young woman   | 896 |
| working up at, I think, Columbia       | 897 |
| University on communities of practice, | 898 |
| having to tell her a story to make the | 899 |
| point why I thought -- her thesis was  | 900 |
| that communities of practice will not  | 901 |
| work in a downsizing economy because   | 902 |
| people are hired for what they know    | 903 |
| and, therefore, are resistant to       | 904 |
| sharing, especially in a downsizing    | 905 |
| economy.                               | 906 |
| I told her the story of our            | 907 |
| experience in the bank, which had been | 908 |
| that -- in fact, we found that was     | 909 |
| true in the beginning: knowledge is    | 910 |
| power, and some people refused to      | 911 |
| share what they knew because if you    | 912 |
| wanted it, you had to pay for it.      | 913 |
| They thought their job was at risk.    | 914 |
| But the more we got into sharing       | 915 |
| knowledge, it sort of dawned upon us   | 916 |
| that no matter how much you share, if  | 917 |
| you tell everything you know, there is | 918 |
| something you cannot give away; which  | 919 |
| is your own experience.                | 920 |
| I can tell you everything I know       | 921 |
| about slum upgrading and so on and so  | 922 |
| forth. And, if you're an architect, a  | 923 |
| lot of it would make a lot of sense to | 924 |
| you. Some of these things you may be   | 925 |
| able to put to practice directly.      | 926 |
| But, very frequently, you can know     | 927 |
| it, you'll have a better understanding | 928 |
| and so on, but I still have the        | 929 |
| experience of having done it and,      | 930 |
| that, you can't give away. You can't   | 931 |
| share it. You can share the story,     | 932 |
| you can share the lessons and          | 933 |
| knowledge, but not the experience,     | 934 |
| somehow.                               | 935 |
| <br>                                   |     |
| INTERVIEWER: What do you think         | 961 |
| these sessions that you did in 1997 -- | 962 |
| what do you think you meant to convey? | 963 |
| STORYTELLER 3: 1997 and most of 1998   | 964 |
| is when I really -- '98 and '99, just  | 965 |

|  |      |
|--|------|
| for the record, because in -- I was    | 966  |
| very much on a learning curve at that  | 967  |
| time.                                  | 968  |
| The question was?                      | 969  |
| INTERVIEWER: What do you think was     | 970  |
| meant to be conveyed? -- really meant  | 971  |
| to be conveyed.                        | 972  |
| STORYTELLER 3: The underlying message  | 973  |
| is that we have to change the way      | 974  |
| we're doing business -- that's a       | 975  |
| pretty big message -- and not through  | 976  |
| a formal reengineering, but in the way | 977  |
| we do things.                          | 978  |
| And we're still trying to give that    | 979  |
| message and trying to implement it, I  | 980  |
| might add. It's never over. You        | 981  |
| always have to continue doing it.      | 982  |
| So that was the main message: That,    | 983  |
| to be effective, to really have a      | 984  |
| greater impact, we have to do much     | 985  |
| more, and one way to do it is to       | 986  |
| change the way we do business. We      | 987  |
| have to stop doing business in the old | 988  |
| way, hoarding knowledge. We have to    | 989  |
| start sharing knowledge. This is what  | 990  |
| knowledge management is about. And we  | 991  |
| have to foster these communities of    | 992  |
| practice, these thematic groups.       | 993  |
| I think that was the message: that     | 994  |
| it can work for you. That was very     | 995  |
| much the punchline. The conclusion     | 996  |
| that one hoped listeners would draw    | 997  |
| was, "Hey, I've been in situations     | 998  |
| like that. I bet I could do that."     | 999  |
| That's a conclusion that one hoped     | 1000 |
| that they would draw.                  | 1001 |

## Appendix L: Storyteller 4

|  |    |
|--|----|
| Well, we first went                      | 32 |
| through the process of trying to explain | 33 |
| what is knowledge sharing -- or, at the  | 34 |
| time, knowledge management. And the      | 35 |
| more you tried to explain it in a jargon | 36 |
| that was used at the time in the         | 37 |
| industry, the more we lost our audience  | 38 |
| for two reasons: one, it had to be       | 39 |
| tailored to the realities of the         | 40 |
| organization, so you couldn't just take  | 41 |
| the definitions out there and bring it   | 42 |
| in; and two, even when you tailored it   | 43 |
| to the organization, it still didn't     | 44 |
| connect.                                 | 45 |
| So we tried to find a way of at          | 46 |
| least explaining what is it that we're   | 47 |
| talking about when we talk about a       | 48 |
| knowledge sharing community or a         | 49 |
| knowledge sharing behavior. We started   | 50 |
| sort of looking for what would we define | 51 |
| as a good behavior and we stumbled on    | 52 |
| few interesting cases. So we said it     | 53 |
| will be a nice way of sharing this.      | 54 |
| Then we tried to focus on real           | 55 |
| experiences like that and we began       | 56 |
| disseminating it both in print form, as  | 57 |
| well as just verbally, talking about     | 58 |
| cases: A team in X Country faced with    | 59 |
| problem and this is the way they solve   | 60 |
| it.                                      | 61 |
| And they solved it by reaching           | 62 |
| out to the rest of the community, using  | 63 |
| modern technology, and they were able,   | 64 |
| as a result, to get the collective       | 65 |
| institutional knowledge of the whole     | 66 |
| organization or that larger community    | 67 |
| rather than just their own that was      | 68 |
| between their ears.                      | 69 |
| And these stories began getting          | 70 |
| sort of a -- not a life of their own --  | 71 |
| but began having a face on them because  | 72 |
| in power point presentations, we could   | 73 |
| put the face of that individual who did  | 74 |
| it. People could relate to that. It      | 75 |
| became more credible because it provided | 76 |

|  |     |
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| like a second opinion. It wasn't only    | 77  |
| me saying it. They could check with      | 78  |
| that person. There was a second person   | 79  |
| out there.                               | 80  |
| So it gave the message a certain         | 81  |
| robustness and credibility which         | 82  |
| theoretical jargon and conceptual        | 83  |
| presentations usually did not carry.     | 84  |
| So that was the sort of genesis          | 85  |
| of the thing. And the more we did that   | 86  |
| the more we realized the power of the    | 87  |
| stories captured in very synthetic for   | 88  |
| We were not talking about people         | 89  |
| reading 20-, 30-page documents; but      | 90  |
| snapshots, summary renditions of an      | 91  |
| experience.                              | 92  |
| INTERVIEWER: How did you come to that    | 93  |
| point to realize?                        | 94  |
| STORYTELLER 4: Because the initial       | 95  |
| feedback for the kinds of tools and      | 96  |
| services that we were using was that -   | 97  |
| you know, there were different types of  | 98  |
| -- typically, it would break down into   | 99  |
| one-third, one-third, one-third:         | 100 |
| one-third were comfortable with this     | 101 |
| medium, one-third were comfortable with  | 102 |
| the computer, one-third would be         | 103 |
| comfortable with the paper medium.       | 104 |
| And there would be another               | 105 |
| third, somewhere around there, that we   | 106 |
| neither comfortable with these two but   | 107 |
| they liked the verbal.                   | 108 |
| In the process, we also found            | 109 |
| out that people just don't have time t   | 110 |
| read the overflow of the information.    | 111 |
| Hence, how do you get syntheses of the   | 112 |
| experiences and focus the message to the | 113 |
| essentials?                              | 114 |
| So we pushed into the direction          | 115 |
| of synthetic. Whether it was on the      | 116 |
| web, whether it was on paper, or in      | 117 |
| presentations, we tried to be very       | 118 |
| synthetic. Like we have a publication    | 119 |
| called Good Practice Info Briefs or      | 120 |
| Findings, which I can show you. And t    | 121 |
| Info Brief is sort of one-and-a-half     | 122 |

|   |     |
|---|-----|
| pages of an experience that you could     | 123 |
| write an 80-page report on.               | 124 |
| INTERVIEWER: So, when you say             | 125 |
| "synthetic," you mean it captures that    | 126 |
| synopsis of what happened.                | 127 |
| STORYTELLER 4: It captures the essence of | 128 |
| the message and, mostly, in terms of,     | 129 |
| what were the lessons? What was           | 130 |
| innovative about it? How was it done      | 131 |
| and how did it get the job done? We       | 132 |
| found that, in one page, you could say    | 133 |
| lot.                                      | 134 |
| So, from that, grew out a way of          | 135 |
| presenting these stories in very          | 136 |
| synthetic form and trying to get the      | 137 |
| essence of the story packaged in such     | 138 |
| way that, while it was interesting to     | 139 |
| listen to, it also brought home hidden    | 140 |
| messages in between.                      | 141 |
| Because, if we wanted to use              | 142 |
| that story to change people's way of      | 143 |
| doing business, that story had to have    | 144 |
| content, that story had to have the       | 145 |
| actual case or a practice or an event     | 146 |
| that would end up with an outcome or a    | 147 |
| result that was not just so-so, but very  | 148 |
| shocking sometimes; shocking in the       | 149 |
| sense of, "Oh, my gosh, I can't believe   | 150 |
| that this could be done" or "Wow, I       | 151 |
| never would have expected something so    | 152 |
| simple to produce such great results."    | 153 |
| So it was use of these types of           | 154 |
| stories of cases of whatever we were      | 155 |
| discussing; whether it was behaviors      | 156 |
| within the organization, whether it was   | 157 |
| how our colleagues interact with our      | 158 |
| clients. There may have been thematic     | 159 |
| applications in a particular sector       | 160 |
| application. A certain small innovation   | 161 |
| could mean differences in the lives of    | 162 |
| people that we were dealing with.         | 163 |
| And these were the kinds of               | 164 |
| stories that began, finally, to get       | 165 |
| through to people because it was          | 166 |
| incontestable, unless you wanted to       | 167 |
| contest the facts, in terms of the power  | 168 |

|  |     |
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| of the message; that it can be done,     | 169 |
| others have done it.                     | 170 |
| Then, in between the lines,              | 171 |
| would be the message, "Well, why don't   | 172 |
| you do it. If you don't believe this,    | 173 |
| okay. Ask questions. If you want to      | 174 |
| corroborate, now you know this face, y   | 175 |
| know, the name, you know the situation   | 176 |
| Go and find out. And if you're           | 177 |
| satisfied that this is true, how are y   | 178 |
| going to deal with the message that was  | 179 |
| there in terms of engaging you?"         | 180 |
| So I think the psychology --             | 181 |
| sort of organizational psychology of     | 182 |
| change helped us a lot in getting the    | 183 |
| message across.                          | 184 |
| And we found that this was a             | 185 |
| great learning tool, both for the people | 186 |
| who were pulling the stories together    | 187 |
| because it forced them to be sort of     | 188 |
| more careful in how they got the message | 189 |
| across --                                | 190 |
| (Telephone interruption.)                | 191 |
| INTERVIEWER: So how do you know the      | 192 |
| audience was responding? How did you     | 193 |
| know that?                               | 194 |
| STORYTELLER 4: In cases where the        | 195 |
| presentation was verbal, the easiest o   | 196 |
| was body language. You could feel that   | 197 |
| you have connected. There was this       | 198 |
| "wow." And the next way would be "Can    | 199 |
| we know a little bit more about it?"     | 200 |
| the followup, seeking more information   | 201 |
| INTERVIEWER: When was that done; during  | 202 |
| or after the presentation?               | 203 |
| STORYTELLER 4: Sometimes during,         | 204 |
| sometimes after, people would be asking  | 205 |
| for --                                   | 206 |
| (Telephone interruption.)                | 207 |
| INTERVIEWER: You were saying that to     | 208 |
| look at the audience response, it was    | 209 |
| usually to the verbal and it was         | 210 |
| basically through body language that y   | 211 |
| felt like they were connecting.          | 212 |
| STORYTELLER 4: Yeah.                     | 213 |
| INTERVIEWER: What did that look like?    | 214 |

|  |     |
|--|-----|
| STORYTELLER 4: First, the element of     | 215 |
| surprise, if the case that you were      | 216 |
| reporting really tried to show, for      | 217 |
| example, how a small intervention or     | 218 |
| innovation can have such a great impact  | 219 |
| whether it's on maternal mortality       | 220 |
| reduction or increasing agricultural     | 221 |
| production or on how quickly you could   | 222 |
| respond to a client who was asking for   | 223 |
| something and, in the past, normally,    | 224 |
| would take us two months to get back t   | 225 |
| them and now we are able to respond very | 226 |
| quickly, in a matter of hours.           | 227 |
| These were the kinds of things           | 228 |
| that would capture people's imagination  | 229 |
| "Hey, this is a good story."             | 230 |
| The followups would usually want         | 231 |
| to find out a little bit more: in what   | 232 |
| context was it done and where can they   | 233 |
| get some more information.               | 234 |
| But the most important impact --         | 235 |
| as I started saying earlier -- was we    | 236 |
| thought it was a good learning medium,   | 237 |
| both for the people who were trying to   | 238 |
| get the message across -- because it     | 239 |
| forced them to distill the essence of    | 240 |
| the case, so that (indiscernible) and    | 241 |
| the technique of synthesis, and knowing  | 242 |
| what, in the story, you could write 40   | 243 |
| pages on, what would you distill into    | 244 |
| one-page written document and what would | 245 |
| you distill into one slide with four     | 246 |
| bullets.                                 | 247 |
| I know that I went through that          | 248 |
| exercise, myself, many times. And it     | 249 |
| was not that easy, at the beginning.     | 250 |
| INTERVIEWER: Can you talk about it? --   | 251 |
| what you went through in the beginning   | 252 |
| and then as you became more comfortable  | 253 |
| STORYTELLER 4: It was a sort of          | 254 |
| learning-by-doing-typing of thing.       | 255 |
| First was the question of                | 256 |
| length. I mean, you know, obviously,     | 257 |
| nobody would look at a slide with fine   | 258 |
| print. So, the more you shortened it,    | 259 |
| the more you realized the words were key | 260 |

|  |     |
|--|-----|
| or the combination of words was key.     | 261 |
| After that, in my case, I first          | 262 |
| thought of sort of getting the whole     | 263 |
| thing out in terms of prose. But then    | 264 |
| you realize that sometimes you can left  | 265 |
| (sic) certain things unsaid, and you     | 266 |
| rely on the imagination of the audience  | 267 |
| provided that you've given them enough   | 268 |
| of the building blocks.                  | 269 |
| You don't have to say                    | 270 |
| everything. You have to send some key    | 271 |
| messages. And you hope that that         | 272 |
| combination, then, is going to prepare   | 273 |
| the audience for either the main theme   | 274 |
| that you're trying to conclude with, et  | 275 |
| cetera, so that you can come back to     | 276 |
| these stories.                           | 277 |
| And you remember that story of           | 278 |
| X, Y, and Z to make a point. But that    | 279 |
| point was not made when the story was    | 280 |
| told.                                    | 281 |
| So, if you have two or three of          | 282 |
| these cases in a presentation, towards   | 283 |
| the end, you can come back to some of    | 284 |
| these and pull that little nugget that   | 285 |
| was implicit, and only begins making     | 286 |
| sense towards the end.                   | 287 |
| And it's a useful way of keeping         | 288 |
| the audience engaged. It's sort of like  | 289 |
| a good movie that does not tell you      | 290 |
| everything but gives you enough for you  | 291 |
| to tease it.                             | 292 |
| So, as we went doing this -- I           | 293 |
| mean, we just learned a little bit, so   | 294 |
| of these ways of better communicating    | 295 |
| the messages.                            | 296 |
| <br>                                     |     |
| But the impact that that story           | 395 |
| conveyed in terms of changing a practice | 396 |
| that had so many implications in terms   | 397 |
| of the health of the community,          | 398 |
| productivity, et cetera, et cetera was   | 399 |
| compelling. People just flocked, after   | 400 |
| that, trying to find out whether this    | 401 |
| person was real.                         | 402 |
| This is a dramatic example of            | 403 |

|  |     |
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| the storytelling or the narrative. And   | 404 |
| obviously, it's a very                   | 405 |
| resource-intensive way of communicating  | 406 |
| Sometimes you can't bring these types    | 407 |
| of people here.                          | 408 |
| But, used strategically, it can          | 409 |
| really help in pushing through some so   | 410 |
| of a -- usually a                        | 411 |
| mental-cultural-social-type of barrier   | 412 |
| whether it's in an organization, whether | 413 |
| it's in a smaller group within a team.   | 414 |
| So, as a result, we started              | 415 |
| using that more and more. And we         | 416 |
| started writing these things up. We      | 417 |
| write things up about these types of     | 418 |
| experiences that some of the community   | 419 |
| in our client countries go through, will | 420 |
| great results. That conveys, sometime    | 421 |
| more than any of our reports can do.     | 422 |
| <br>                                     |     |
| INTERVIEWER: How did you go about        | 436 |
| picking?                                 | 437 |
| STORYTELLER 4: Very serendipitous, very  | 438 |
| opportunistic. You had to keep your      | 439 |
| eyes and ears open. You hear something   | 440 |
| you grab it. And, sometimes, these       | 441 |
| things are right in front of your nose   | 442 |
| and we're just not trained to see it.    | 443 |
| But, once you start looking for it,      | 444 |
| you'll find it very, very quickly. It    | 445 |
| very interesting.                        | 446 |
| So that would be one theme               | 447 |
| within the organization: how do you      | 448 |
| share; this notion that sharing and      | 449 |
| learning are two sides of the same coin  | 450 |
| and how, by sharing, you learn. A lot    | 451 |
| of stories revolved around that.         | 452 |
| Then we had a set of stories,            | 453 |
| very much coming in terms of the         | 454 |
| experiences of how we're learning from   | 455 |
| our clients and what is it that they're  | 456 |
| doing that we can learn from?            | 457 |
| Part of the process was                  | 458 |
| distilling, transforming it into a       | 459 |
| package that responded to some of the    | 460 |
| sort of stylistic, even, requirements    | 461 |

|  |     |
|--|-----|
| the culture here, to make it, like,      | 462 |
| serious.                                 | 463 |
| INTERVIEWER: You said you would be       | 464 |
| looking for it and you would know it,    | 465 |
| when you saw it, to grab it.             | 466 |
| Serendipitously, somehow, you would know | 467 |
| it.                                      | 468 |
| STORYTELLER 4: Yeah.                     | 469 |
| INTERVIEWER: Would it be for a           | 470 |
| particular group that you would grab     | 471 |
| that and have it in mind or it was jus   | 472 |
| that particular information that came?   | 473 |
| STORYTELLER 4: No. I mean, sometimes,    | 474 |
| you would get overwhelmed with the power | 475 |
| of that particular case, like this case  | 476 |
| I just recounted to you.                 | 477 |
| <br>                                     |     |
| So leveraging the knowledge of           | 583 |
| the institution improved the quality of  | 584 |
| the service that you gave your client.   | 585 |
| That is another favorite of              | 586 |
| mine, and I've used, because that        | 587 |
| conveys that by sharing, by trying to    | 588 |
| learn from others, you can improve the   | 589 |
| way you work and the quality of your     | 590 |
| work, and that sharing and learning is   | 591 |
| part of a community, that you cannot do  | 592 |
| it alone.                                | 593 |
| And it conveys the importance of         | 594 |
| being open and sharing because one day   | 595 |
| you will be on the receiving end; on     | 596 |
| another day, you will be on the deliver  | 597 |
| end.                                     | 598 |
| So these were sort of the                | 599 |
| sub-themes that were running between the | 600 |
| text or the story. It was implicit.      | 601 |
| was sort of a modeling that type of      | 602 |
| behavior.                                | 603 |
| This was a real person. It was           | 604 |
| a senior person with a lot of experience | 605 |
| who could have relied on first instinct  | 606 |
| or what was between his own ears. Well   | 607 |
| that was not as powerful as what is      | 608 |
| between the ears of 25 other people.     | 609 |
| So it gets the message across            | 610 |
| that no matter how well you know that    | 611 |

subject, you might learn. But you have 612  
to reach out. 613  
And because it's a real case, I 614  
always use the pictures of these people 615  
on a power point presentation. They 616  
say, who sent out the SOS? But, more 617  
importantly, who responded? And what 618  
was the impact of this event or process 619  
So these are the kinds of ways 620  
we've tried to use stories. 621  
INTERVIEWER: Did you create that one? 622  
STORYTELLER 4: I didn't create it, 623  
actually -- well, in terms of putting 624  
in the form of a power point 625  
presentation, yes. But it was not 626  
fictitious. It was actually a real 627  
story. 628

## Appendix M: Storyteller 5

|  |     |
|--|-----|
| What I wanted to say is that behind    | 227 |
| getting to a story you wanted to tell, | 228 |
| there was a whole lot of background    | 229 |
| work. How you would have even          | 230 |
| captured someone who eventually came   | 231 |
| to you with sort of a sophisticated    | 232 |
| request might have been just initially | 233 |
| because you send out a little          | 234 |
| newsletter and they ask you for a copy | 235 |
| of something. So that these stories,   | 236 |
| quote-unquote, don't just arrive       | 237 |
| full-blown out of nowhere. It's        | 238 |
| building up on a relationship.         | 239 |
| I think that was the other thing I     | 240 |
| really want to stress: we found that   | 241 |
| this kind of work enabled you to build | 242 |
| up a relationship with the requestor,  | 243 |
| so that they would put forward what    | 244 |
| was really a significant request,      | 245 |
| thinking that you, as this group, if   | 246 |
| not answer it personally, but you      | 247 |
| would provide the wherewithal or put   | 248 |
| them in touch with the right people    | 249 |
| and sort of manage the question for    | 250 |
| them.                                  | 251 |
| I think that's one of the other        | 252 |
| issues. They might have sent it        | 253 |
| directly to somebody, and that person  | 254 |
| might have had to answer it 20 times.  | 255 |
| But, then, the 21st time, they were    | 256 |
| still stuck with it. So if we had      | 257 |
| been intervening, we would have that   | 258 |
| information to share with them and     | 259 |
| they wouldn't have to keep bothering   | 260 |
| the person.                            | 261 |
| But, also, that aspect of, if the      | 262 |
| question involves several different    | 263 |
| parties, rather than the requestor     | 264 |
| having to sort of keep track of what   | 265 |
| was happening on that, that would be   | 266 |
| part of the work of this advisory      | 267 |
| service.                               | 268 |
| So just to sort of give some           | 269 |
| background there that, eventually, we  | 270 |
| obviously did come up with some        | 271 |

|  |     |
|--|-----|
| stories that were interesting. But,    | 272 |
| again, it wasn't in a vacuum that      | 273 |
| these arose; the kind of trust, et     | 274 |
| cetera, that involved coming up with a | 275 |
| sophisticated request.                 | 276 |
| INTERVIEWER: Before you go on, let     | 277 |
| me ask, then: You said you came up     | 278 |
| with them. The first question I have   | 279 |
| is, why did you think story was the    | 280 |
| best way to approach?                  | 281 |
| STORYTELLER 5: Now, we didn't          | 282 |
| necessarily think -- I mean, that was  | 283 |
| part of working -- in other words, our | 284 |
| sort of day-to-day work was, more or   | 285 |
| less, let's respond to these           | 286 |
| questions, get them on. What we could  | 287 |
| certainly see is that we needed to     | 288 |
| capitalize on the information and      | 289 |
| knowledge that was gained through      | 290 |
| this, so we could store it in a way    | 291 |
| that it could be easily reused.        | 292 |
| But, in order to, again, get people    | 293 |
| on to using a service -- to be able to | 294 |
| do that, there's a lot of marketing    | 295 |
| involved and a lot of connections.     | 296 |
| And, although we had, let's say --     | 297 |
| certainly, at the very beginning, we   | 298 |
| had a sort of very -- one of the       | 299 |
| phrases that Barry uses -- relentless  | 300 |
| communication.                         | 301 |
| But people didn't, still,              | 302 |
| necessarily get it. Why would they     | 303 |
| come there? Why would they ask either  | 304 |
| an advisory service or a thematic      | 305 |
| group for help? What would make them   | 306 |
| want to do this?                       | 307 |
| So, both working with a sort of        | 308 |
| central coordinating group of the      | 309 |
| knowledge sharing group and also our   | 310 |
| own things, we realized that stories   | 311 |
| were one way that people would say,    | 312 |
| "All right. I see what you mean. If    | 313 |
| I had a question like that, I could    | 314 |
| come to that group."                   | 315 |
| So it sort of broadens the base on     | 316 |
| which you could get people involved in | 317 |

|  |     |
|--|-----|
| asking for information.                | 318 |
| These advisory services are not        | 437 |
| libraries, per se. They don't try to   | 438 |
| have, let's say, a big library about   | 439 |
| education or about health or whatever. | 440 |
| So, when you would have something      | 441 |
| that you really needed literature      | 442 |
| search or a data base search, you      | 443 |
| would turn it over to one of the       | 444 |
| libraries because, again, that's their | 445 |
| value added, in knowing that. So we    | 446 |
| would ask the library to do a search.  | 447 |
| Then we would look through the sort    | 448 |
| of internal documents and find out     | 449 |
| what are some bank case studies that   | 450 |
| are related.                           | 451 |
| Again, you see managing several        | 452 |
| different strands but, also, being     | 453 |
| capable of understanding what the      | 454 |
| question was and where you would go,   | 455 |
| who you would ask, what kinds of       | 456 |
| things would be useful.                | 457 |
| But one of the other clinchers here    | 458 |
| is that this wasn't six months later;  | 459 |
| that we would manage to pull this      | 460 |
| together, let's say, within a week.    | 461 |
| So, perhaps, this task manager -- as   | 462 |
| we call them here -- or project        | 463 |
| manager would have been on mission     | 464 |
| there, and probably for a week. So     | 465 |
| there would be enough time to go over  | 466 |
| that with the ministry officials.      | 467 |
| So the rapidity with which these       | 468 |
| things were attended to or are         | 469 |
| attended to is also something that     | 470 |
| seems to make quite a difference, as   | 471 |
| well as, obviously, quality.           | 472 |
| If you're going to turn over           | 473 |
| something like this and it's going to  | 474 |
| be very visible to the ministry, you   | 475 |
| want to be sure that you've turned it  | 476 |
| over to the right place, and that the  | 477 |
| kinds of things that they're going to  | 478 |
| give you have been vetted and are      | 479 |
| appropriate and solid and so forth.    | 480 |

So that's -- going back to that 481  
point: that's why that's not a help 482  
desk. A help desk wouldn't be able to 483  
do that kind of thing and, obviously, 484  
also, some of these very high-profile 485  
things. 486  
Then, if we had a question about how 487  
to handle this, we would go either to, 488  
let's say, one of the directors in our 489  
department. Or, again, the whole way 490  
that the knowledge sharing was set up, 491  
we'd have these -- for example, in 492  
education, we had thematic groups in 493  
various aspects. So we would have 494  
gone to the professionals in that 495  
group who would be most likely to know 496  
what would be the thing. 497  
So, again, this is not done in a 498  
vacuum. It would be pooling together 499  
resources and just sort of making it 500  
all happen. 501

INTERVIEWER: So, when you presented 874  
these to your audience, how did they 875  
-- what happened? 876  
STORYTELLER 5: Again, it's not A and 877  
B. You don't necessarily know. 878  
INTERVIEWER: This audience. 879  
STORYTELLER 5: They took these -- we 880  
might not even know. For this 881  
particular one -- again, this is not 882  
to the education audience, so we might 883  
not even know. These groups may go 884  
off and try to do the same thing for 885  
themselves or even have a presentation 886  
and know that they should have stories 887  
in it. So you don't necessarily know. 888  
Within, let's say, the more specific 889  
context, you would presume that you 890  
would get more of the 250 educators to 891  
come and use your service by showing 892  
them these examples. But you never 893  
know. And you wouldn't even know if 894  
they were responding to that 895  
particular story, so it's sort of a 896  
shot in the dark. 897

|  |      |
|--|------|
| INTERVIEWER: So you just felt that     | 898  |
| it was still a good way to --          | 899  |
| STORYTELLER 5: Right. Right. Right.    | 900  |
| I think what we found in this is you   | 901  |
| need to have a gamut of means that     | 902  |
| you're reaching and reinforcing your   | 903  |
| audience, or even if your audience is  | 904  |
| already asking for things: "Oh, I      | 905  |
| didn't think of asking about that."    | 906  |
| So it just sort of brings together,    | 907  |
| I think, a lot of the different things | 908  |
| that you want to express to an         | 909  |
| audience, how you could help them.     | 910  |
| INTERVIEWER: Did you ever present      | 911  |
| this without using the stories? Did    | 912  |
| you ever talk about this process       | 913  |
| without using the stories?             | 914  |
| STORYTELLER 5: Uh-huh. Uh-huh.         | 915  |
| INTERVIEWER: Was there any             | 916  |
| difference in the way people responded | 917  |
| between the two presentations?         | 918  |
| STORYTELLER 5: You don't necessarily   | 919  |
| know, unless you have sort of a        | 920  |
| control group, sort of, over time,     | 921  |
| involved --                            | 922  |
| INTERVIEWER: I know. But just          | 923  |
| based on your perception.              | 924  |
| STORYTELLER 5: It seemed that it       | 925  |
| helped. I mean, obviously, now we      | 926  |
| would include this. In my perception,  | 927  |
| it would seem that this was a good way | 928  |
| to remind people, at sort of a lot of  | 929  |
| different levels, why, not only an     | 930  |
| advisory service, but why having a     | 931  |
| system like this in an organization    | 932  |
| would be helpful to be able to store   | 933  |
| knowledge, turn to it again, and so    | 934  |
| forth, and pull it all together, and   | 935  |
| would reenforce the need for such a    | 936  |
| system like that.                      | 937  |
| <br>                                   |      |
| INTERVIEWER: Great. Thank you.         | 1271 |
| I know our time is up.                 | 1272 |
| May I e-mail you if I need to get      | 1273 |
| clear on --                            | 1274 |
| STORYTELLER 5: Sure. I guess what I    | 1275 |

just wanted to say is that these 1276  
stories are not in a vacuum. That's 1277  
why I wanted to paint this larger 1278  
picture. It's a very useful tool but 1279  
it's not the only tool. But it's 1280  
certainly sort of the cream of the 1281  
crop. 1282

But you have to have a lot of things 1283  
to get somebody there to listen to 1284  
your story. 1285

INTERVIEWER: A lot of things there 1286  
to get somebody to listen. 1287

STORYTELLER 5: Uh-huh. 1288

INTERVIEWER: And that would be all 1289  
of the things we've talked about? 1290

STORYTELLER 5: Right. Right. And I 1291  
think, also, being able to hone in on 1292  
-- now, again, some of these are very 1293  
general -- in this world, what would 1294  
be some of the reasons it would be 1295  
interesting? 1296

Well, it was high profile. It was 1297  
far-reaching. It was timely. It was 1298  
provided within the time that the 1299  
person needed. It required a lot of 1300  
legwork that would have been difficult 1301  
for an individual to have done. It 1302  
required knowing just where to go and 1303  
get it. 1304

And it also required a lot of sort 1305  
of TLC. Maybe these other people had 1306  
priorities but, because you had a 1307  
relationship with them, you sort of 1308  
struck them, "You know, I really need 1309  
this and could you really help me 1310  
out." It's a package. 1311

And just one last thing: a story 1312  
which I used in trying to sort of 1313  
explain to people. 1314

Well, this is sort of like, I'm 1315  
staying at a really fancy hotel in New 1316  
York and I really need some theater 1317  
tickets that night. So I've gone to 1318  
the concierge and I just said, "You 1319  
know, I just really need these theater 1320  
tickets." And, you know, I don't 1321

|                                       |      |
|---------------------------------------|------|
| really care too much how they get the | 1322 |
| theater tickets; I just want them.    | 1323 |
| But it seems to work that way.        | 1324 |
| I'll end with that story.             | 1325 |

## Appendix N: Storyteller 6

|  |    |
|--|----|
| I was simply in this                     | 6  |
| difficult position, essentially, I       | 7  |
| think: kicked out of the World Bank,     | 8  |
| after having been a highly successful    | 9  |
| manager kicked out for no particular     | 10 |
| reason; just politics had changed.       | 11 |
| So they told me to go and                | 12 |
| look into information, so I looked at    | 13 |
| information and saw that that would sa   | 14 |
| us money, if we fixed all that up.       | 15 |
| Something needed fixing up but we        | 16 |
| needed, really, to do something more     | 17 |
| radical; and that was have a more        | 18 |
| relevant mission for the organization.   | 19 |
| INTERVIEWER: What were                   | 46 |
| they doing?                              | 47 |
| STORYTELLER 6: Walking in                | 48 |
| the other direction. I was persona non   | 49 |
| grata. Everyone knew the management      | 50 |
| sort of had it in for me.                | 51 |
| As it turned out, they had               | 52 |
| it in for everyone at my particular      | 53 |
| level; just sort of cleaning out all the | 54 |
| people at my level. It took them a       | 55 |
| couple of years to do it. I was just     | 56 |
| one of the first people. It was nothing  | 57 |
| personal, as it turned out.              | 58 |
| And most of the people                   | 59 |
| just left. But I wasn't quite ready t    | 60 |
| leave, so I stuck around. I was a        | 61 |
| desperate man. I'm ready to try          | 62 |
| anything.                                | 63 |
| But I could see this was                 | 64 |
| resonating. But, again, I wasn't         | 65 |
| thinking much about it. Sometimes I'd    | 66 |
| make presentations without the story     | 67 |
| and, often, they'd go rather badly, but  | 68 |
| it still wasn't dawning on me what was   | 69 |
| going on. I was just sort of stumbling   | 70 |
| along.                                   | 71 |
| INTERVIEWER: "Badly."                    | 72 |
| How would they go badly?                 | 73 |
| STORYTELLER 6: People would              | 74 |
| be all upset at the end of it, and say   | 75 |
| "This is nonsense, this doesn't make a   | 76 |

|  |     |
|--|-----|
| sense, it's all bullshit." And you'd     | 77  |
| wonder what had gone wrong.              | 78  |
| So this led to a whole                   | 79  |
| group of people in the organization sort | 80  |
| of thinking this was a good idea. And    | 81  |
| then the president thought about it an   | 82  |
| he thought it was a good idea. Then he   | 83  |
| went and announced it in the annual      | 84  |
| meeting in front of 170 finance          | 85  |
| ministers and their entourages. So       | 86  |
| (indiscernible) public occasion.         | 87  |
| And, of course, this was                 | 88  |
| just the beginning of the war because    | 89  |
| lot of the managers were traditional     | 90  |
| managers were totally opposed to it.     | 91  |
| it was really the beginning of three t   | 92  |
| four years of pitched battles as to      | 93  |
| whether we were going to do what the     | 94  |
| president had announced or not.          | 95  |
| And throughout '97, I was                | 96  |
| continuing to use stories but, again,    | 97  |
| not very articulately, not thinking much | 98  |
| about it.                                | 99  |
| The Organization was sort of             | 100 |
| perceived as moving along quite rapidly  | 101 |
| in this new area of knowledge            | 102 |
| management. In '97, knowledge            | 103 |
| management was quite new, and what the   | 104 |
| Organization was doing seemed to be quit | 105 |
| agile and cutting edge, and the World    | 106 |
| Bank started to be perceived as a lead   | 107 |
| So people started to ask                 | 108 |
| me, "Well, what are you doing? This      | 109 |
| Organization has never been a leader in  | 110 |
| anything else, before. What are you      | 111 |
| doing to it?"                            | 112 |
| So I put up a slide one                  | 113 |
| day at a conference in North Carolina    | 114 |
| the end of '97: Maybe it's got           | 115 |
| something to do with story telling.      | 116 |
| That was really all that I said: Maybe   | 117 |
| it's got something to do with story      | 118 |
| telling.                                 | 119 |
| It was part of a long                    | 120 |
| presentation. And immediately after      | 121 |
| that, somebody from Harvard Business     | 122 |

|   |     |
|---|-----|
| School Press came up to me and said I   | 123 |
| should write a book. And I said,        | 124 |
| "About what?" And they said, "About     | 125 |
| story telling."                         | 126 |
| I said, "You know, what's               | 127 |
| in that slide 'Maybe it's got something | 128 |
| to do with story telling' that's about  | 129 |
| all I know about the subject." Maybe    | 130 |
| it's got something to do with story     | 131 |
| telling.                                | 132 |
| And she said, "Well, don't              | 133 |
| worry about it. Just start writing and  | 134 |
| eventually, you'll figure it out."      | 135 |
| <br>                                    |     |
| STORYTELLER 6: Well, it's               | 177 |
| described in detail in the book with    | 178 |
| these springboard stories.              | 179 |
| INTERVIEWER: Can you talk               | 180 |
| to me about that?                       | 181 |
| STORYTELLER 6: Yes. The                 | 182 |
| single protagonist who is prototypical  | 183 |
| of the organization and who is involve  | 184 |
| in a real life example where the change | 185 |
| idea is (indiscernible). It's           | 186 |
| plausible. It could have happened. But  | 187 |
| it's unexpected. There's something      | 188 |
| remarkable about it. And it's true.     | 189 |
| It's told in a very                     | 190 |
| minimalist fashion. You don't give very | 191 |
| many details about the story; just      | 192 |
| enough for people to follow it. And it  | 193 |
| has to have a happy ending Hollywood    | 194 |
| ending.                                 | 195 |
| The reason why this seems               | 196 |
| to work my hypothesis is that the       | 197 |
| listener starts to imagine a new story  | 198 |
| And, of course, it's told in this       | 199 |
| minimal fashion. There's plenty of      | 200 |
| space for them to imagine their story.  | 201 |
| <br>                                    |     |
| The team leader contacted               | 356 |
| the community of tax administration     | 357 |
| experts, 60 people inside and outside   | 358 |
| the Organization, and said, "Can anyone | 359 |
| help me here in Madagascar because we'  | 360 |
| having this issue and I think I'm right | 361 |

but let me know what you think." And 362  
got advice in the succeeding 48 hours. 363  
Somebody from the Moscow 364  
office of the Organization, somebody fro 365  
the Indonesia office, somebody who was 366  
retired, somebody who was a professor 367  
Toronto; a whole group of people from 368  
different parts of inside and outside 369  
the Organization came back to him within 370  
this 48hour period and said, "Well, no 371  
you're on the wrong track. Medicines 372  
had been and should be exempt for the 373  
following reasons, and it works out very 374  
well." 375  
He, in fact, changed the 376  
direction, and that became the official 377  
position of the Organization and became 378  
what happened in the value added tax in 379  
Madagascar. So, if you go to Madagascar 380  
and look at the legislation, that's 381  
what's in Madagascar. 382  
What's enabling this to 383  
happen is the fact that these 60 people 384  
are a community. Because when that 385  
class team leader in Madagascar sent o 386  
that email, asking for help, asking for 387  
advice, essentially he's saying, "I'm 388  
big shot in the Organization, supposedly 389  
the expert in the field. But here I a 390  
saying I don't know. Here I am, asking 391  
for advice about something I should 392  
know." 393  
And it's something that's 394  
quite risky in an organization that's 395  
downsizing, unless he knows who he's 396  
sending it to. And he knows who he's 397  
sending it to because these people have 398  
met, they're a community. They're tax 399  
people. They like getting questions 400  
like this because it's through this that 401  
people learn what the evolving field of 402  
tax administration is. 403  
So this was a story we 404  
told in '99 and 2000 at a point, in 405  
fact, where the management had forgotten 406  
why they were doing knowledge 407

management. It does happen in big 408  
organizations. You have many things 409  
going on and people lose track of why 410  
things are going and sometimes they needed 411  
to be reminded. 412  
So this was one of the 413  
occasions when we used the story to 414  
remind the management and the Board of 415  
Directors what this was about. 416  
And that story, while not 417  
our best story, was effective in 418  
communicating the idea of knowledge 419  
management, which was then endorsed by 420  
the Board of Directors and became the 421  
key strategic pillar for this compact 422  
January 2000, et cetera, et cetera. 423  
In each case, when we were 424  
confronted with these occasions to 425  
explain knowledge management, we would 426  
use a story like that to introduce the 427  
subject, and then go on to say how that 428  
idea was being rolled out throughout the 429  
organization. 430  
INTERVIEWER: You said 431  
that it wasn't the best story. What was 432  
the best story? 433  
STORYTELLER 6: Well, 434  
Pakistan is the simplest. 435  
INTERVIEWER: The 436  
highways? 437  
STORYTELLER 6: The highway 438  
story. And one could actually mold the 439  
Madagascar story more towards the 440  
Pakistan story. 441  
One of the things that 442  
some of the audiences get tripped up on 443  
is that they think they know the right 444  
answer as to whether medicines should 445  
should not be exempt. And that actual 446  
distracts them from the underlying idea 447  
Whereas, in the Pakistan 448  
highway story, there was a new 449  
technology. And I never explain, to 450  
most audiences, what the new technology 451  
was. And, as a result, it's totally 452  
opaque to people whether it was a good 453

idea or a bad idea. It was just a 454  
question of a new technology. 455

So, if I was recrafting 456  
the Madagascar story, I would probably 457  
leave out the details of what exactly 458  
was the idea, so that we didn't get hung 459  
up on the inherent substance of it. W 460  
don't want people discussing the 461  
substance whether medicine should be 462  
exempt from VAT. 463

INTERVIEWER: Did they? 464

STORYTELLER 6: Well, yeah. 465

That's what sometimes happened. One o 466  
two of the board members said that the 467  
were utterly shocked that an 468  
organization like the Organization anybody 469  
who regarded themselves as an expert i 470  
tax administration could even be 471  
thinking that medicine should be 472  
subjected to tax. This was sort of a 473  
ghastly reflection on the Organizations 474  
and organization. 475

To answer to them, I say, 476  
don't you think it's quite remarkable 477  
that, here, people are actually asking 478  
for advice? And here's the case of the 479  
Organization learning about something that 480  
they should have known. But they did, 481  
in fact, learn. That's what this whole 482  
thing is about. 483

What happened, though, 484  
once you're starting to discuss the 485  
substance, you're distracting from the 486  
underlying idea, which is sharing 487  
knowledge. 488

So the Pakistan story 489  
conforms more to the criterion of told 490  
in this minimalist fashion. The 491  
Madagascar story is not quite as 492  
minimalist and, as a result, not quite 493  
as effective. 494

This is one of the most 495  
difficult things for people to learn in 496  
telling stories like this; to recognize 497  
that you don't need to give those 498  
details. The details get in the way. 499

|  |     |
|--|-----|
| The story teller or person               | 500 |
| who comes and thinks, "I'm a great       | 501 |
| raconteur, I'm a great teller of         | 502 |
| stories," I mean, they actually are a    | 503 |
| bit of a problem because they cannot     | 504 |
| stop themselves from going into the      | 505 |
| details, all of these fascinating        | 506 |
| details which, of course, intrigue the   | 507 |
| audience enormously, but prevent the     | 508 |
| audience from starting to have their own | 509 |
| story. So one has to restrain these      | 510 |
| (indiscernible) for the good story       | 511 |
| teller.                                  | 512 |
| It's sort of like the                    | 513 |
| symphony conductor who says, "You should | 514 |
| never look at the brass section because  | 515 |
| that will only encourage them." You      | 516 |
| don't want to encourage the              | 517 |
| In fact, the good story I                | 518 |
| mean, this is one of the big problems    | 519 |
| for me, is when people find it difficult | 520 |
| to accept that we are not trying to tell | 521 |
| a, quote, good story. I will tell a      | 522 |
| story correspondent to the principles    | 523 |
| that have been described by Aristotle    | 524 |
| and tens of thousands of books, ever     | 525 |
| since. But that idea of a story doesn't  | 526 |
| work.                                    | 527 |
| These kinds of stories                   | 528 |
| stand in relation to a well told story   | 529 |
| a haiku stands in relation to a sonnet   | 530 |
| Someone who'd only seen a sonnet, when   | 531 |
| confronted with a haiku would say,       | 532 |
| "Well, that's not a poem. There are no   | 533 |
| rhymes, there's no rhythm, there's no    | 534 |
| turning point, there's no closing        | 535 |
| couplet. This is not a poem."            | 536 |
| That's the reaction of                   | 537 |
| some people to these kinds of stories:   | 538 |
| they're not even stories, at all;        | 539 |
| they're so minimal. They work in a       | 540 |
| different way.                           | 541 |
| Learning to make it                      | 542 |
| minimalist is something that as I say,   | 543 |
| the Madagascar story would have been     | 544 |
| more effective if it was told in a more  | 545 |

|  |     |
|--|-----|
| minimalist fashion. Because I was        | 546 |
| getting this reaction, explained to me   | 547 |
| why the substance once anyone asks about | 548 |
| the substance, you know that it's not    | 549 |
| working the way it's meant to work.      | 550 |
| INTERVIEWER: So, when                    | 551 |
| it's working, it actually, as you're     | 552 |
| saying, it should get them to start      | 553 |
| thinking their own story.                | 554 |
| STORYTELLER 6: That's the                | 555 |
| bottom line. That's the only thing that  | 556 |
| matters.                                 | 557 |
| INTERVIEWER: So how do                   | 558 |
| you know to make these?                  | 559 |
| STORYTELLER 6: Well, you                 | 560 |
| try it out on an audience and see. When  | 561 |
| we have a sort of workshop, you use the  | 562 |
| other participants as the audience. S    | 563 |
| you ask the audience, "Did it work for   | 564 |
| you?"                                    | 565 |
| Sometimes the audience                   | 566 |
| will say, "Yeah, it worked beautifully   | 567 |
| or, often, they'll say, "No, there was   | 568 |
| much too much detail." Sometimes you'    | 569 |
| get a split. You'll have people saying   | 570 |
| "Too much for me" and others saying,     | 571 |
| "Not enough."                            | 572 |
| Then you have to figure                  | 573 |
| out what is the eventual audience going  | 574 |
| to be composed of. What is enough for    | 575 |
| one group may not be enough for another  | 576 |
| If you're talking, say, to               | 577 |
| a highway group, and you're telling the  | 578 |
| Pakistan highway story, then you         | 579 |
| probably have to say what the technology | 580 |
| is. It would not be convincing for the   | 581 |
| if you simply say, "a technology." The   | 582 |
| first question will be                   | 583 |
| But then you can simply                  | 584 |
| refer to it, and say, they were          | 585 |
| inquiring about inverted pavement        | 586 |
| technology, and they all know what it    | 587 |
| is. But if I say that to a group of      | 588 |
| non-specialists, "What the hell is that  | 589 |
| So it becomes a problem.                 | 590 |
| INTERVIEWER: How did you                 | 591 |

|  |     |
|--|-----|
| go about making a selection? What did    | 592 |
| you know was the right subjects, topic   | 593 |
| content to pick?                         | 594 |
| STORYTELLER 6: For?                      | 595 |
| INTERVIEWER: For your                    | 596 |
| stories.                                 | 597 |
| STORYTELLER 6: Well, as I                | 598 |
| say, I didn't get into this as a story   | 599 |
| teller trying to find stories. I was     | 600 |
| trying to convince an organization to    | 601 |
| accept an idea. I stumbled on one story  | 602 |
| that worked.                             | 603 |
| Then, when I found the                   | 604 |
| organization had decided to do it, then  | 605 |
| I realized I needed a new story. I       | 606 |
| couldn't go on talking about Zambia, so  | 607 |
| I found Chile, I found the Chile story.  | 608 |
| It seemed to work pretty well in         | 609 |
| January, February 1997.                  | 610 |
| Then, by December of '97,                | 611 |
| that had worn out, so I needed a new     | 612 |
| story, so I concocted Yemen.             | 613 |
| INTERVIEWER: How did you                 | 614 |
| find these?                              | 615 |
| STORYTELLER 6: I asked                   | 616 |
| around. I said, "Anyone got a story?     | 617 |
| Anyone got an example?"                  | 618 |
| Typically, what you                      | 619 |
| initially find is something that doesn't | 620 |
| look very promising, something that is   | 621 |
| only a fragment of the eventual story.   | 622 |
| The Pakistan story, for                  | 623 |
| instance, when I first saw it, it was    | 624 |
| somebody had gotten some advice from     | 625 |
| Jordan. They were in Pakistan and        | 626 |
| they'd gotten some advice from Jordan.   | 627 |
| That was all.                            | 628 |
| So I said, well, that will               | 629 |
| never do, and not very interesting. So   | 630 |
| I threw it away. And when I'd thrown     | 631 |
| everything away and I had to make my     | 632 |
| presentation, I got back to the reject   | 633 |
| pile and went through it again and said  | 634 |
| "Well, does anything else happen in      | 635 |
| this?"                                   | 636 |
| "Oh, yes, there was                      | 637 |

somebody in Argentina. Oh, yes, there 638  
was the guy in South Africa. Oh, yes, 639  
New Zealand chipped in." 640  
So, suddenly, it started 641  
to look as though it had some potential 642  
INTERVIEWER: Who were you 643  
asking? 644  
STORYTELLER 6: This was the 645  
person who had sent me the email. I had 646  
sent around emails, people had sent me 647  
emails and said, here's something that 648  
happened. So I'd go back and say, "Go 649  
your email. Tell me more. Is there 650  
anything else?" 651  
You don't find a story 652  
like a stone on a path, sort of 653  
readymade. What you find are fragment 654  
which a story is created, not in the 655  
sense of being fictitious, but in the 656  
sense of woven together in a particular 657  
way so that it has the effect that you 658  
intend. 659  
So you have to weave the 660  
elements together. And the story has 661  
be told from the perspective of a sing 662  
person. 663  
Typically, you hear the 664  
story, not from the protagonist; you 665  
hear the story from someone else who's 666  
observed it, third hand. And if you tell 667  
it from that observer's perspective, 668  
then it doesn't work. You have to have 669  
somebody who is prototypical of the 670  
organization. 671  
So if it's somebody in a 672  
back room who's observed this happening 673  
and you tell a story about someone in 674  
back room, then the reaction is, "They 675  
should get rid of all these people in 676  
the back room." 677  
But if you tell it about 678  
someone who is in Pakistan, face to face 679  
with a client, no one is thinking, 680  
"Well, they should get rid of this 681  
person." That is sort of frontline work 682  
where value is added for the clients o 683

the Organization. So everyone is 684  
thinking, "Yeah, that is what the World 685  
Bank is about; that kind of a person." 686  
So telling the story from 687  
the protagonist, who is seen as 688  
quintessential, is radically different 689  
from telling the story from somebody in 690  
the back room who heard about the story 691  
and the person who told it to me. 692  
So switching the viewpoint 693  
is another crucial part of weaving the 694  
story together so that it's told from 695  
the perspective of this single 696  
protagonist who's prototypical of the 697  
organization. 698  
And that was one of the 699  
biggest mistakes that the interns made 700  
when they were collecting stories. They 701  
would tell the story the way they hear 702  
it. And you have to transpose it, to 703  
move it to the person to whom this 704  
actually happened in the front lines, 705  
fighting the good fight of the World 706  
Bank; not somebody in the back room 707  
who's just observing this at a safe 708  
distance. 709  
INTERVIEWER: So the 710  
protagonist is the task manager, the 711  
task leader? 712  
STORYTELLER 6: Whoever will 713  
resonate with the audience. In the 714  
Organization, the prototypical person 715  
someone who's in a faraway place, 716  
out of the way place in the world and who 717  
desperate to get the answer to a 718  
question on some esoteric, complicated 719  
topic is such a familiar and central 720  
part of the work of the Organization that 721  
when you tell a story about that, 722  
everybody is immediately resonating, 723  
saying, "I know that. I've been there 724  
I've done that. That's me." 725  
If it's an oil company, it 726  
would be an oil driller. If it's a 727  
sales organization, a salesman; someone 728  
with whom that audience is immediately 729

|  |      |
|--|------|
| thinking, "Hey, that's me. I've been     | 730  |
| that situation." Then there's only a     | 731  |
| tiny leap for the audience to make the   | 732  |
| own story.                               | 733  |
| Now, if you make it very                 | 734  |
| different, of course it's still possible | 735  |
| to make the leap, but many people won't  | 736  |
| actually get there. Many people will     | 737  |
| fall by the wayside and will actually    | 738  |
| spring somewhere else.                   | 739  |
| They'll spring backwards                 | 740  |
| and think, "Well, what was happening     | 741  |
| before this?" or "What happened next in  | 742  |
| the story of the protagonist? Tell us    | 743  |
| more about that." They won't make the    | 744  |
| spring into their own story.             | 745  |
| You're trying to get                     | 746  |
| people to make a spring into their own   | 747  |
| story. So you make this tiny, little     | 748  |
| leap. So you make the protagonist        | 749  |
| (indiscernible) so the audience will     | 750  |
| just automatically say, "Yeah, that's    | 751  |
| me. That's my situation."                | 752  |
| <br>                                     |      |
| INTERVIEWER: Why is a                    | 1082 |
| he happy ending so important?            | 1083 |
| STORYTELLER 6: Well, that's              | 1084 |
| what works.                              | 1085 |
| One theory or hypothesis                 | 1086 |
| from Euroscience (sp) is that what       | 1087 |
| happens when you tell a story with an    | 1088 |
| unhappy ending is                        | 1089 |
| You have the human brain:                | 1090 |
| the cortex; the mammal (ph) brain,       | 1091 |
| underneath; and the reptile (ph) brain   | 1092 |
| under (indiscernible). And when          | 1093 |
| something bad happens to you, this       | 1094 |
| mammal reptile brains sort of kick in a  | 1095 |
| say, "Do something, do something."       | 1096 |
| If you're driving along                  | 1097 |
| the highway and not paying much          | 1098 |
| attention and something happens, it's    | 1099 |
| these little gadgets that they're not    | 1100 |
| very smart but they're very quick and    | 1101 |
| they cause a lot of commotion and they   | 1102 |
| wake you up and, hopefully, you survive  | 1103 |

|  |      |
|--|------|
| You pay attention.                       | 1104 |
| So, if you tell a story                  | 1105 |
| with an unhappy ending about a firm the  | 1106 |
| went bankrupt because they didn't        | 1107 |
| implement knowledge management, then     | 1108 |
| what could be happening is that these    | 1109 |
| mammal reptile brains are kicking in,    | 1110 |
| saying, "Wake up, do something,          | 1111 |
| something bad has happened" and cause    | 1112 |
| the human brain to intervene and say,    | 1113 |
| "Calm down, reptile brain, you may lead  | 1114 |
| something from this instructing          | 1115 |
| experience."                             | 1116 |
| But, after an encounter                  | 1117 |
| with the reptile brain, the person is    | 1118 |
| no shape to move forward with a rapid    | 1119 |
| action, enthusiastic action.             | 1120 |
| But if you're telling a                  | 1121 |
| story about "I've got an answer to a     | 1122 |
| question" and resolved it, so the wholly | 1123 |
| organization was much better off, then   | 1124 |
| what could be happening is that that     | 1125 |
| mammal reptile brain, that limbic system | 1126 |
| is providing an endogenous opiate reward | 1127 |
| to the cortex.                           | 1128 |
| When things are going                    | 1129 |
| well, it injects dopamine into parts o   | 1130 |
| the cortex and creates this warm and     | 1131 |
| floaty feeling wonderful, warm, floaty   | 1132 |
| feeling that you've just seen a          | 1133 |
| wonderful movie.                         | 1134 |
| Wow. You're reading for                  | 1135 |
| anything. You're ready for a new future  | 1136 |
| for yourself, your family, your          | 1137 |
| organization. "Wow. Yeah. I'm ready      | 1138 |
| Let's do it."                            | 1139 |
| So the state of mind of                  | 1140 |
| someone who's heard a story with that    | 1141 |
| plausible, happy ending is different     | 1142 |
| from somebody who's heard a bad ending   | 1143 |
| story with a bad ending.                 | 1144 |
| In pragmatic terms, I just               | 1145 |
| haven't had any success with stories     | 1146 |
| that have bad endings. I mean, you can   | 1147 |
| see it in these workshops. When people   | 1148 |
| tell stories with unhappy endings, we    | 1149 |

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| ask the class, "Does anyone feel like    | 1150 |
| they'd be liable to get up and say,      | 1151 |
| 'Wow, I'm going to do something about    | 1152 |
| that?'" No. Everyone is recovering       | 1153 |
| from the bad news of the story.          | 1154 |
| <br>                                     |      |
| INTERVIEWER: All the                     | 1785 |
| stories say something about time, the    | 1786 |
| issue of time.                           | 1787 |
| STORYTELLER 6: Well,                     | 1788 |
| knowledge sharing is largely about       | 1789 |
| accelerating the process of sharing      | 1790 |
| knowledge. Eventually, knowledge does    | 1791 |
| wend its weight and does get shed and    | 1792 |
| (indiscernible) like the Organization.   | 1793 |
| But if it takes nine months, that's not  | 1794 |
| very helpful. If it happens in nine      | 1795 |
| hours, people say, "Wow, that's          | 1796 |
| helpful."                                | 1797 |
| So the remarkable aspect                 | 1798 |
| of the stories that I told are typical   | 1799 |
| about time and an accelerated schedule   | 1800 |
| accelerating the process; something that | 1801 |
| would eventually happen but not in       | 1802 |
| anything like that timeframe.            | 1803 |
| But, often, the stories                  | 1804 |
| other people in other organizations tell | 1805 |
| are not necessarily about time. It can   | 1806 |
| be about just a different something      | 1807 |
| different and quite remarkable.          | 1808 |
| INTERVIEWER: So it could                 | 1809 |
| be something different and, in this      | 1810 |
| instance, it was about time. That        | 1811 |
| sounds like it breaks tradition, the     | 1812 |
| traditional way people get what they     | 1813 |
| need. Is that tough to get people to     | 1814 |
| make that leap to that point, if they'   | 1815 |
| caught up in tradition?                  | 1816 |
| STORYTELLER 6: Well, as I                | 1817 |
| say, nothing else worked. I mean,        | 1818 |
| reason didn't work, charts didn't work   | 1819 |
| But if you can get people to follow a    | 1820 |
| story, then this worked with some        | 1821 |
| people.                                  | 1822 |
| It didn't work with                      | 1823 |
| everyone but it started to work with     | 1824 |

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| large numbers of people and so it        | 1825 |
| probably, eventually, part of an         | 1826 |
| organization heard the story and, yeah   | 1827 |
| it worked for a part of the staff.       | 1828 |
| You don't really need 100                | 1829 |
| percent. If you get a third of the       | 1830 |
| staff to become enthusiastic and, yeah   | 1831 |
| you have a solid contingent of people.   | 1832 |
| Story is one of the things               | 1833 |
| that, if you can get people to follow    | 1834 |
| the story and tell the story in the      | 1835 |
| right way, this has a good chance of     | 1836 |
| working with a big segment of the        | 1837 |
| audience. But it's a question of trial   | 1838 |
| and error as to what works and what      | 1839 |
| doesn't work.                            | 1840 |
| Different audiences will                 | 1841 |
| need different levels of detail. And     | 1842 |
| what is remarkable for one audience will | 1843 |
| seem totally boring for another.         | 1844 |
| So knowing your audience                 | 1845 |
| like a hunter has to become on the same  | 1846 |
| level as the prey, you have to enter     | 1847 |
| into the world of the prey and           | 1848 |
| understand that world and the vocabulary | 1849 |
| and the language and the mannerisms an   | 1850 |
| all of that, so that you become part o   | 1851 |
| that environment.                        | 1852 |
| If you come in as a                      | 1853 |
| foreigner, a foreign expert, there's a   | 1854 |
| real risk that you will be not           | 1855 |
| effective.                               | 1856 |
| Although, that's what I do               | 1857 |
| now. I get parachuted into situations    | 1858 |
| company, and I obviously do not know t   | 1859 |
| environment of McDonald's and UniLever   | 1860 |
| or (Indiscernible), IBM. So I make no    | 1861 |
| pretense of trying to say I understand   | 1862 |
| I simply tell my story:                  | 1863 |
| "This is what I did when I was in the    | 1864 |
| Organization. And if it's helpful to you | 1865 |
| to follow my story, good. If you can'    | 1866 |
| get anything out of it, I'm sorry. You   | 1867 |
| will have to solve your own problems a   | 1868 |
| IBM (indiscernible).                     | 1869 |
| So that's worked                         | 1870 |

|   |      |
|---|------|
| remarkably well with people listening   | 1871 |
| my story. It has many parallels across  | 1872 |
| what's happening in organizations today | 1873 |
| Most all organizations, really, are     | 1874 |
| going through a transformation, and     | 1875 |
| they're all having huge problems in     | 1876 |
| trying to communicate.                  | 1877 |
| I found a person who's                  | 1878 |
| stuck with the job of trying to do that | 1879 |
| in Siberia. So people who come to my    | 1880 |
| workshops are people who are being sent | 1881 |
| to Siberia, and have these mammoth,     | 1882 |
| impossible tasks. And they say, "Is it  | 1883 |
| possible? Can it be done?"              | 1884 |
| So my story is a message                | 1885 |
| of hope for some of these people; that  | 1886 |
| there is life after Siberia. And, yes   | 1887 |
| it is possible and there are things,    | 1888 |
| like narratives, which, if told in the  | 1889 |
| right way, can work quite remarkably.   | 1890 |

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## RESUME

**Betsy A. Arnette****Education:**

*College:* Virginia Polytechnic Institute, Ph.D. Adult Learning Human Development

Boston University, M.Ed. Human Resource Development

University of North Carolina B.S. Management

**Experience:**

As an instructional designer, program developer and organizational development consultant, Ms. Arnette has been involved in staff development for 14 years. She has developed numerous curricula and the associated courses and designed development programs for varied audiences within three national headquarter organizations. She has designed evaluation instruments, assessed needs and developed strategies and interventions to facilitate organizational and individual development. Ms. Arnette's initiatives and training curricula designs have always considered and accommodated time constraints and availability of all staff. Her courses and job aids have reached national audiences.

Ms. Arnette is an accomplished training and development department manager. She coordinated with and served as the community liaison for the development of community programs within an overseas environment. She worked with and implemented the training for volunteers from host nation and military bases. She designed and prepared the pamphlets and curricula for workshops, training seminars, and course promotions and facilitated the Train-the-Trainer programs. She designed, developed and facilitated an effective management development program for an entire headquarters organization. She designed, developed and facilitated an organization's individual development program that ranged from technical skill building to executive development.

Ms. Arnette is a skilled facilitator and instructor. She is certified to administer and counsel the Myers Briggs Type Indicator (MBTI) and the Center for Creative Leadership 360-Degree Assessment. In addition, she is an authorized to instruct Covey time management, Harvard mutual gains negotiation and MicroSoft workshops.