

How to use stories to size up a situation

WHY TRADITIONAL INTERVIEWS AND SURVEYS ARE INSUFFICIENT FOR UNDERSTANDING WHAT IS REALLY GOING ON IN YOUR ORGANISATION.

INTRODUCTION

In 2004, a large mining company embarked on a review of a major division. The company engaged a top-shelf consulting firm to assess the division's current operation and to identify opportunities for improvement. The consultants drafted a set of interview questions. Of the 35 questions, 31 asked 'what' or 'how' questions—such as: "What determines the success of the organisation?" and "How do you decide what to work on?". This is a common approach which, over the years, has produced useful insights. However, in an increasingly complex and fast-paced world, does it result in a sufficiently rich picture of what is really occurring in the organisation? Such traditional interviews and surveys, although useful, are insufficient.

There are four problems with traditional interviews and surveys:

- interview and survey questions assume the validity of a hypothesis—interviewers tend to find what they are looking for;
- interviewees rationalise their answers when asked for their opinions—the messiness of their day-to-day activities are quickly tidied-up to provide neat answers;
- interviewees provide the answers that are on the top of their minds—they only know what they know when they need to know it; and
- the questions provide minimal context—how many times have you answered a survey and found yourself thinking: 'It depends... '.

For these reasons, this paper argues that narrative techniques are required to supplement the traditional approach of interviews and surveys.

WHAT IS NARRATIVE?

When you undertake any project the first task is, typically, to size up the situation and understand the true nature of the problem that you are addressing. Narrative techniques provide a powerful addition to your diagnosis toolkit. Collecting workplace stories— anecdotes of people's lives at work, how they get things done, who they work with—enables a rich tapestry to emerge. Such a tapestry reflects the reality of the messy complexity of organisational life.

Narrative is not organisation 'storytelling'. Storytelling is primarily concerned with creating stories designed to persuade people. In contrast, organisational narrative seeks to gather workplace anecdotes that reveal the true values and themes in operation. Anecdote has developed a rich set of narrative techniques and we have used these techniques to collect thousands of anecdotes across a wide range of organisations. We are continually surprised with what we discover. In every case, we enter the 'discovery phase' without any particular hypothesis—in an attempt to dispel our preconceived ideas of what is happening. We then collect anecdotes around broad themes of interest. Invariably, new insights appear.

By Shawn Callahan

This paper provides a description of when and how to use narrative techniques to supplement traditional interviews and surveys. It focuses on a technique called 'anecdote circles', and illustrates how these circles can be set up and conducted in a manner that ensures the collection of rich stories. The paper concludes with solutions to the three most common problems encountered by facilitators of anecdote circles.

Apart from uncovering a new viewpoint, the anecdotes became powerful communication devices for convincing senior management of this alternative perspective. It is difficult to argue against a collection of anecdotes.

Narrative is more open-ended—frequently revealing unexpected and important results.

Of course, the information that we collect remains confidential. To give you a sense of what these anecdotes are like, here are two published examples.^[1]

You ought to be here when Miss McDermott is expected on a visit. The bosses run around like mad all day making sure that the place is spotless, last time they even threw the mops away in their panic, they didn't have time to put them away... They never dare open their mouth [in the presence of Miss McDermott], it's Gill from school meals who does all the talking.

When all the odds are against me, you know, I'm trying to help this consumer and everybody is saying no you can't have an engineer—I won't let anything go, because I get on to it and go on and on, and then I will start going up the line higher and eventually somebody will listen and then the job gets done; and somebody rings up and she says I'm happy and then I put the phone down and I think 'hurrah we have done it!' but then why is it necessary to go through all this trouble ... it is more of a challenge then and I get more excited.

These examples show that an anecdote provides a real account of someone's experience. And whether the stories are autobiographical or about colleagues, they are always told from the teller's perspective. The anecdotes can be quite short (like the ones above), or they can extend for a number of paragraphs. The language is how the person speaks—without modification. Each anecdote provides perspectives on what it is really like to work in a particular organisation.

Unlike a traditional structured interview or survey, narrative assumes little regarding the issues that are likely to emerge. The techniques recognise that modern organisations are highly connected, fast-paced, and complex. Surveys and interviews assume possible solutions, and the questions are crafted to explore these assumptions. Narrative is more open-ended—frequently revealing unexpected and important results.

A project that we performed on the ageing workforce illustrates this point. The company had conducted research into why people leave the organisation. It had developed a view that accorded with the 'Gen-X' stereotype—that younger employees are unlikely to pursue a career and stay in the organisation for the long term. After collecting anecdotes from younger employees, we found that the opposite was true. In fact, the organisation had unknowingly developed a strong sense of identity among these employees. Long-term careers were considered desirable. Apart from uncovering a new viewpoint, the anecdotes became powerful communication devices for convincing senior management of this alternative perspective. It is difficult to argue against a collection of anecdotes.

We should not abandon interview and surveys. Indeed, they can work effectively in conjunction with business narrative. A traditional survey might highlight a potential problem area—such as pinpointing dissatisfied employees. Narrative can then be used to obtain a richer understanding of the complex issue. The converse is also true. Narrative can be the starting-point—with interviews and surveys then being used to drill into an issue. The two approaches go hand-in-hand.

WHAT YOU NEED TO KNOW

So what do you need to do to use business narrative? The starting point is to capture anecdotes. We call this phase 'discovery'. *Discovery* is followed by 'sense-making'—in which people from the organisation we are working with use the anecdotes to identify important issues to work on. We then use these results to understand the nature of the issues faced by the organisation. Following *sense-making*, the final step is 'intervention design'—in which we apply complexity principles to develop a range of interventions.

Although Anecdote has a complete method and a range of techniques for the elicitation of anecdotes, this paper focuses on the *discovery* phase, and describes the 'anecdote circle' technique.

An anecdote circle is working if the members of the group are telling stories to each other—rather than telling them to the facilitator.

If we force the truth, we get lies; and if we allow lies, we get the truth.

ANECDOTE CIRCLES

My first anecdote circle remains a vivid memory. We were developing a knowledge strategy for a scientific organisation and I had gathered a group of eight natural-resource scientists to record their stories. Our theme was 'research funding'. As the facilitator, I asked the opening question: "When have you been most frustrated or delighted in gaining research funds?". There was a 'deafening silence' that seemed to hang forever. I held my nerve and said nothing. To my great relief, the grey-haired fellow on my right took a deep breath and said: "Oh all right then, I'll go first". He proceeded to tell a story of how he had been forced to manipulate the system to receive his last funding grant. From this point on, the group was relentless. Story upon story poured forth, and when I eventually proceeded to wrap up the session they voted to adjourn to the pub to continue the conversation.

As this example illustrates, an anecdote circle is a group of people (ideally between six and twelve) who share common experiences. They might have performed the same role, worked on projects together, or formed part of a larger cohort of people within the organisation. These people are peers. An anecdote circle creates one important dynamic—through hearing the stories of colleagues, others remember their own stories. This creates a conducive environment for storytelling. It is similar to a stimulating discussion at a dinner party.

ROLE OF THE FACILITATOR

The facilitator's role is instrumental. Facilitators pose the questions to get storytelling in the circle started, but they must be careful not to turn the circle into a group interview. An anecdote circle is working if the members of the group are telling stories to *each other*—rather than telling them to the *facilitator*. Facilitators must minimise their personal impact as much as possible, and must be careful not to lead the group.

An anecdote circle differs from a focus group. An anecdote circle is less concerned with the group's opinions and judgments; rather, it seeks to elicit anecdotes. Whenever the facilitator hears someone state an opinion, the facilitator must intervene and ask the person for an example, or an experience, or an anecdote. The group usually becomes self regulating quite quickly. Facilitators will know that an anecdote circle is working well when they hear members of the group remind a colleague: "Yes, that's your opinion; but what would be an example?".

Simply asking people to tell stories rarely results in stories being told. Participants are often unsure what is meant. We find that it is better to ask questions, such as: "When have you been most frustrated or delighted?" or "Tell me about the good old days; how is it different now?". Questions such as these immediately conjure up stories—because they provide an emotional 'hook' for people to recall their past experiences. There is also an intriguing paradox to consider: *if we force the truth, we get lies; and if we allow lies, we get the truth*. The content of the stories is less important than the meaning that they convey. We frequently encourage people to tell the experiences of their colleagues: "Yes, this would not happen to you, but do you know of anyone to whom it has happened?"

TECHNIQUES TO INCREASE RICHNESS

There are a range of techniques to enrich the process of an anecdote circle—including ‘timelines’, ‘ditting’, and ‘alternative histories’.^[1]

Timelines are a most effective way to get a circle going. The facilitator draws a timeline and asks people to place events on it in relation to the theme being investigated. For example, in a lessons project, we might mark out the project’s key events and then ask for stories around each one.

Ditting is the natural phenomenon of story ‘one-up-manship’. One person tells a story and then another has a better one, and so it goes. Facilitators should encourage ditting because it creates significant energy in the group and is a natural generator of stories. They should listen for boastful or somewhat unbelievable stories, and then ask: “Can anyone do better than that?”.

Seeking *alternative histories* is another useful technique. We ask the group to identify turning points, and have them tell the story as if the alternative scenario had unfolded.

Each of these techniques is designed to foster as many anecdotes as possible, and to provide alternative perspectives.

LOGISTICS

The logistics of anecdote circles are simple. Each session runs for 60-90 minutes, and is recorded. We set up a room with a table and recording equipment to capture the conversation. The audio files are sent to a transcription company, and are later returned to our project team in word-processing format. We then extract the anecdotes from the transcriptions in preparation for the follow-up workshop activities (*sense-making* and *intervention design*, as noted above).

Individual stories are not analysed; rather, we consider all the anecdotes together in an innovative workshop environment and make sense of the macro patterns that emerge.

COMMON MISTAKES

The most common mistake made by new facilitators is to ask question upon question compulsively—thus turning the anecdote circle into an interview. When posing questions, the facilitator must be patient, resist the urge to fill a silence with another question, and be ready to change tack rapidly. For example, if a question does not resonate with the group, a much simpler question might be asked to get the group comfortable with the process. Such a question might be: “How long have you been in your current role?”. Once such simple questions have been answered, the facilitator can move to more important questions.

Occasionally, a group will become ‘stuck’—and be unable to recall any stories. In this situation it is helpful to ask someone to draw a timeline, and ask members of the group to single out important events. This process helps people to remember, and new stories then emerge.

The last common mistake to be avoided is including people in the group from different levels in an organisation’s hierarchy. I remember an anecdote circle in which we included the managing director, some members of his personal staff, and a couple of people from the next level down in the hierarchy. In the middle of a junior staff member’s retelling of an experience, the managing director blurted out: “That’s not what happened!”. And with that short outburst the session was effectively over! Everyone ‘clammed up’. It is important to remember that these sessions work best when only peers are present.

It is important to remember that these sessions work best when only peers are present.

Narrative is an important aspect of our ability to deal with grey and complex issues through the stories we tell each other.

CONCLUSION

We have used organisational narrative techniques in a wide range of projects—including knowledge strategy, occupational health and safety, ageing workforce, trust, cash economy, and innovation. In each case, such techniques have revealed new insights that were unlikely to have been discovered using traditional techniques.

Narrative is an important aspect of our ability to deal with grey and complex issues through the stories we tell each other. Traditional interviews and surveys leave many holes. However, a combination of narrative techniques and traditional surveys and interviews can provide a much richer and compelling understanding of a complex situation.

REFERENCES

1. Snowden, D. *Organic Knowledge Management - Part 3*. Knowledge Management 2000, 3, 15-19.