# *Complementary Forms of Writing for Organisational Learning*

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*This article discusses learning about the limits (and benefits) of using slide presentations to present complex realities and to bring about organisational learning and change. It discusses the role of written reports and meetings to complement slide presentations and enhance learning.*

**KEYWORDS:** Complexity, systems theory, organisational change, learning, SAVI® communications, sensemaking, emergence, writing

## *Introduction*

In this article I discuss how I learned about the limits and benefits of using slide presentations to present complex realities and bring about organisational learning and change. I describe how my approach to this with one client evolved over two years working in the US, UK, Italy and Turkey—in other words how I learnt too. The context is sensemaking in relation to market, industry or organisational data, rather than the use of presentations and reports for learning about concepts, tools or techniques.

The way I have made sense of what emerged in the series of projects described here is influenced by several theories about how organisations work and change. Specifically, I draw on Systems-Centred theory (SCT) (Agazarian, 1997; Gantt and Agazarian, 2006) and its tools, including the SAVI® model, to understand communication patterns. SCT includes a focus on how change happens through the group or organisation's ability to discriminate and integrate differences, as well as the importance of roles, goals and context, and identification of behaviours that approach or avoid goals. I also draw on the strand of complexity theory which acknowledges the complex, emergent, often unexpected nature of what unfolds in organisations, the practice of noticing what is happening in the moment and the notion that change happens through local interaction (Stacey, 2000; Shaw, 2002).

The projects were carried out for a client I've worked with over many years. It operates in one part of a complex distribution chain in many countries. My team helps it to make sense of the chain: what's happening at different points; how organisations react to changes and what informs their behaviour; what roles different parts of the chain perform and how these evolve. We do this through talking to people from different points in the chain, such as wholesalers of the raw materials, manufacturers and retailers, and we report back on the emerging themes. We discuss what we've found and the sense we've made of it with different people in the client organisation in meetings. Over the last two years we've begun to reflect more actively on what is helping and what is getting in the way of how we facilitate the client's learning.

One way we do this is to help the client describe the system it is part of with maps and rich pictures (Checkland, P and Scholes, J, 1999). The goal is to be able to see the different forces that enable or constrain change, including the impact of our client's strategies and actions on the wider system. Ultimately, the goal is for the client to learn from our work, specifically to refine its models of how the chain works and plan how it will act in the future. In other words, we adopt a classic Action Learning model of plan, act, observe and reflect.

## *'Yes-buts' to PowerPoint*

This client had always asked for—and got from us—PowerPoint slide presentations that summarised the key 'learnings' from our work. People in the organisation like the slide format as they are then able to modify it into an easily digestible summary to inform discussions on what needs to change or happen next.

A couple of years ago we presented a PowerPoint summary of what was happening in the US market. We emailed this to the client in advance and then presented it at a meeting. The three people from the client organisation at the meeting had not read it before we met and sat with crossed arms as we went through it slide by slide. After about 10 minutes I was aware I felt uncomfortable and thought that there was too much detail for them to take in. I asked if they wanted me to continue in the same vein or stop and have a discussion. They asked me to keep going.

After the meeting, my colleague and I discussed our dissatisfaction with the number of 'Yes-buts' each time we made a point that was different from their existing view. In the SAVI® (System for Analyzing Verbal Interaction) model, 'Yes-buts' are a Red Light Competing verbal behaviour and are unlikely to convey the information intended by the speaker to the person they are talking to. The 'Yes-but, Yes-but' is a common pattern in organisations, used to offer a token agreement to something the speaker actually disagrees with. It allows the speaker to have a conversation with themselves rather than with the other person (Byram, 2006 and http://savicommunications.com/savigrid.pdf).

I reflected that we had brought in too much difference; that is, what we were saying was significantly different from the attendees' existing view of the world and we hadn't taken them along with our thinking. (In hindsight, I realised it would have been useful to separate out the 'Yes-buts' and explore the 'yes' first, then the 'but'. Oh, for hindsight in the moment!) This all resonated with my experience of writing the presentation; there was so much detail and I felt dissatisfied both with the level at which we had summarised it and the amount of detail we expected the client to take in first time round.

### *Yes-but, Yes-but pattern*

> "The way to deal with this is to offer them a new contract."
> "Yes-but don't you think we've given them enough already?"
> "Yes-but if we don't do this, we'll never resolve this issue."
> "Yes-but I don't think this is right."

Yes-buts are often accompanied by an opinion-opinion pattern.

In SAVI® any pattern that gets stuck like this one is called an "alert". These are dead-end conversations which tend to generate frustration and fail to solve problems or resolve issues.

Interestingly, the manager we were working with told us in subsequent conversations she was very happy with the work. One of the most contentious slides—on the unintended consequences of the client's actions—was adopted as part of the organisation's strategic thinking and became common parlance. Chris Rodgers (personal communication) has suggested, rightly I think, that:

> the issue might be partly explained in terms of the political dynamics of organisations. In other words, that joint sensemaking 'in the open' and on the back of a 'cold' presentation might be seen as a riskier undertaking than if the opportunity is afforded for people to make sense of contentious issues privately (or with close allies) before being exposed to the material in open forum. The former approach might inevitably generate more 'Yes-buts' as a sort of defence mechanism (because people can't judge how the political territory lies), even if the point being put across resonates with them as a fair reflection of what's going on.

## *'Yes-ands' to a report and presentation*

In the next project on the UK market, I wrote a Word report as an experiment. I found it easier to convey the complex interactions between different parts of the system and the emergent, sometimes unexpected reactions to change. My client also wanted me to present a PowerPoint version as a higher level summary at a meeting. I tried to resist this—I was only seeing the limits of slide presentations at this stage—but knuckled down and discovered I had fun doing it and the end result produced some new insights. I found the presentation easier to do once the complexity had been conveyed and made sense of in the Word report. I also enjoyed enriching the slides with pictures and images that conveyed some of the feeling of what was happening in the market. I had a week between finishing the report and delivering the presentation—crucial to allow the creative juices to add more; to be able to see the 'learnings' at another level and bring in new ones.

The client team also had a week in which to read and absorb the written report. They were delighted with the granularity of the report and how it 'all made sense'. They saw it as a reference point—'my bible'—which they would use, and in practice have used to inform different aspects of their thinking and planning. We had also met their expectation of a higher level summary with the presentation. In the meeting there were no 'Yes-buts'; just 'Yes-ands' as they built on our conclusions and got excited about the implications for various parts of the organisation and how they were going to act next. In SAVI® 'Yes-ands' are an Integrating Green Light behaviour, important to building a problem-solving climate.

I have reflected that we gave them time to absorb the detail and react to the conclusions.

There was a narrative which made sense as a whole. This concurs with Weick's (1995: 17) notion of sensemaking.

> It is the job of the sensemaker to convert a world of experience into an intelligible world. That person's job is not to look for the one true picture that corresponds to a pre-existing, preformed reality. The picture of sensemaking that emerges is not one of the tidy world of Mastermind. Instead the picture that is suggested is 'that there is nobody here but us scratching around trying to make our experience and our world as comprehensible to ourselves in the best way we can, that the various kinds of order that we come up with are a product of our imagination and need, not something dictated to us by Reality Itself. There isn't any One True Map of the earth, of human existence, of the universe, or of Ultimate Reality, a Map supposedly embedded inside these things; there are only maps we construct to make sense of the welter of our experience, and only us to judge whether these maps are worthwhile for us or not' (Fay, 1990: 38).
>
> (Weick 2001: 9)

## *Back to 'Yes-buts' to PowerPoint*

So far, so good. For the next project in Italy I went along with the Italian team's request to present the day after delivering the report. This meant there was no time to do both a written report *and* a slide presentation so I opted for a longer than normal slide presentation. Again, I found the writing dissatisfying; it was harder to build up a story that made sense and link the different, complex interactions between different players. The flow was wooden, not smooth. What we were saying was very different from what one part of the client organisation wanted. It challenged their position and potentially their existence. Again lots of 'Yes-buts'—this time with more aggression. Interestingly, I felt less able as the presenter to substantiate our view of what was happening, even though it was fully backed up by the data. We had built up less of a story, there were fewer quotes and somehow the whole seemed more fragile than in a written report. I and the client manager concluded that we should stick to the format of a written report, short gap and slide presentation. Figure 1 summarises our thinking.

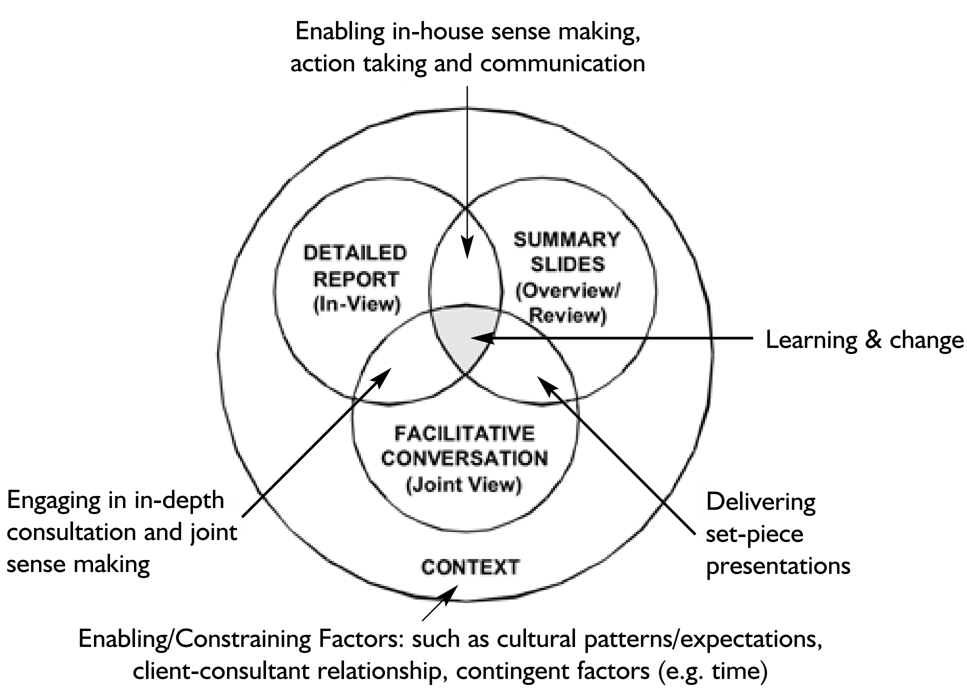


**Figure 1: Two complementary forms of writing**

## *Presenting a report emergently*

In the latest project on Turkey, I sent the Turkey team the report a week ahead of our meeting to discuss it. All but one of the five participants had read the report before the meeting and the one who hadn't was already very familiar with the work we have done in other markets. During the meeting, I simply projected the charts and "maps" from the Word report. We had a lively conversation which followed the energy and curiosity in the room. This links with Stacey's notion that change happens when conversations are open and lively (as opposed to stuck in repetitive themes or incoherent and chaotic). Indeed, for Stacey, "Facilitation of change is facilitation of different forms of conversation." (Stacey, 2000: 365).

## *Conclusion*

Only recently have I explicitly reflected with the client on the role of the writing as a tool for organisational learning. This doesn't mean that the writing wasn't being used for learning—just that it was an implicit, rather than an explicit, goal. My own view has also changed through writing this article. I have become much clearer that written reports, slide presentations and conversations all have their place in making sense of complex data, depending on the goal and the context. One definition of complexity from the Santa Fe Institute is:

> the condition of the universe which is integrated and yet too rich and varied for us to understand in simple common mechanistic or linear ways. We can understand many parts of the universe in these ways but the larger and more intricately related phenomena can only be understood by principles and patterns—not in detail. Complexity deals with the nature of emergence, innovation, learning and adaptation.
>
> (Battram, 1998: 12).

Through this process the client teams and I have come to see that a written report can help both the writer and the reader come to grips with complexity. It allows the individual time to digest and interact with the thinking and data at his or her own pace. It also offers the possibility of making sense of the findings in small groups or one-to-one before expressing opinions in a more public meeting. A written report is also a reference point. It's something individuals and teams go back to when they're thinking through different aspects of their planning. It's more easily accessible to people who weren't at the original meeting as the report has more detail and builds up the thinking in a more transparent way.

I've also come to see the role of the presentation format more clearly—it does help sift the wood from the trees and can be an opportunity to lift the thinking up a level, with the aid of visual tools that are more difficult in a written report. To be of real value it too needs to engage with the complexity—but more through diagrams, images and maps—and surface another level of perceived patterns.

The two forms of writing also address different (perceived) needs of different constituencies of people. The report format is more suited for those people at peer-group level who need to understand and engage with the subject in the same depth as those who were directly involved (who really need to "get their hands dirty" and be able to refer back to the detail). In contrast, the slides, whether presented or distributed, are viewed by clients as a more accessible way to communicate with those whom they judge only need to know the settled-upon outcome (i.e. the formal message). (Thanks to Chris Rodgers for pointing to this implicit conclusion in the first draft.)

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