DIGGING THE DIRT: AN ARCHAEOLOGY OF STORIES OF CHANGE, HISTORY AND IDENTITY IN A TRANSFORMING ORGANISATION

by

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ABSTRACT

Change management theory suggests that taking a planned approach to change in organisations is a successful route to take. However, even the most planned of change programmes fail to achieve their objectives in practice. Some visible factors that can impact on change success, such as culture, leadership and structure, are well recognised. This thesis suggests that hidden aspects of organisations are equally important and employee stories of change provide insight into what lies beneath the surface.

The research reported here was undertaken over 3 years in a mutual insurance company, UK Mutual, as the company underwent significant change. Employee change stories were gathered using appreciative inquiry in semi structured interviews and action research groups. These stories were analysed to develop two key arguments: first, that organisation history frames change programmes and second, that employee identity interacts with history to influence how change is enacted or resisted. Crucially, I show that these factors were also dynamic during the change programme, challenging assumptions within change theory that organisations are ahistorical and that employee identity is static. Finally, this research recommends a new, more reflective approach to change management consulting based on these arguments.

DEDICATION

This thesis is dedicated to my daughter Mia, with love.

ACKNOWLEDGEMENTS

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1 INTRODUCTION

1.1 Research background and rationale

Organisational change has become a constant in many organisations (Watkins, Mohr and Kelly, 2011). But, existing research into organisation change suggests that it is hard to achieve planned outcomes, with many change programmes failing according to previous research (Keller and Aiken, 2008; Hay, Parker and Luksyte, 2020). Hay, Parker and Luksyte (2020) state that change failure is very common because "…achieving successful organisation change is difficult; it has been deemed … one of the most complex and important endeavours in modern organisation life" (p. 2). Existing change management theory suggests taking an ordered and rational approach to change. However, the low success rate of organisation change suggests that these existing models of change are missing a vital component. This research, therefore, investigates what other factors in organisations impact upon the ability of organisations to create sustainable change.

There has been a huge volume of literature related to the management of change in organisations, from major corporate restructurings to managing new technology to changes to structures and ways of working (Andriopoulos and Dawson, 2009). Much of the management literature in this area has focused on providing tools and techniques for managers and change agents to use to manage change successfully in their own organisations (Fernandez and Rainey, 2006; Kotter and Rathgeber, 2006; Alfes, Truss and Gill, 2010). In the academic arena, research has focused on synthesising the various change theories, explaining key aspects of organisational

change such as power relationships and management styles or on the investigation of change management practice in specific organisations (Cockman, Evans and Reynolds, 1999; Andriopoulos and Dawson, 2009; Alfes, Truss and Gill, 2010).

Another current focus in organisation research is organisation storytelling and particularly, in how stories are utilised by organisations experiencing change (Boje, 1991a; Bate, 2004; Langer and Thorup, 2006; Brown, Gabriel and Gherardi, 2009; Whittle, Mueller and Mangan, 2009; Maas, 2012; Boje, Haley and Saylors, 2016). Stories are a natural part of the human experience and as such, are an everyday occurrence and are exchanged at every level of society (Gabriel, 2004) from individual conversations to the media (Andrews et al., 2006). As organisations are simply groups of people, it is reasonable to argue that organisations are full of stories (Gabriel, 1999; 2000; 2009b; Herrero, 2010; Gabriel and Griffiths, 2011) – in fact, they have been described as "… story bearing phenomena … " (Barry, 1997, p. 411).

Often, the stories that are examined in existing storytelling research are from a management perspective whereas I argue that it is important to consider how employee stories can be gathered and used during periods of organisation change. Therefore, this piece of research investigates employee storytelling in organisations further to see if this is a way to make change more sustainable in organisations. The research aims to uncover or excavate some of these underground, unseen and unheard factors that could impact organisation change.

The use of the word 'archaeology' in the title of this thesis is deliberate. There is a need to dig down through the layers of the organisation, much like an archaeologist, to discover the underlying factors that can influence change. In the words of Manfred Kets de Vries (2004), to "… lift up the rug … and pull out the snake and deal with it" (p. 183). Continuing with the archaeology analogy, it requires effort and work to expose these hidden layers. As Macfarlane (2019) says "…actively to retrieve something from the underland almost always requires effortful work. The underland's difficulty of access has long made it a means of symbolizing what cannot openly be said or seen…" (p. 12). But it is important to undertake the effort to understand these unseen factors to enable a deeper understanding of why organisations operate in the way that they do and to attempt to see the unseen (Macfarlane, 2019).

My consultancy work has shown me that many artefacts, structures and processes in organisations have original meanings that somehow had got lost through time. For example, when I worked with a County Council, an organisation chart showed a team structure that made no sense and when it was questioned, a story emerged about the creation of the structure years ago to deal with a particular conflict within the team that had long since been forgotten (and the protagonists had long since left the organisation). In this research, multiple layers of story were identified and re-examined at various points in the study with the same stories revisited multiple times with the same participants.

When archaeologists undertake a dig, they are unsure of what they might find until they get there, despite use of technology which might enable them to see below the

ground without digging. My approach to this research has been the same. Whilst I had ideas about what I wanted to study, the outcome of the study was unclear until the research had started, and my views and ideas continued to develop throughout the study. This development will be examined throughout this thesis.

1.2 Research aims

The research aims evolved over the period of the study, in common with many other inductive pieces of research. Initially, the research started with a broad literature review of the fields of organisation storytelling and change, particularly considering how stories could be used as a means to gather information about how employees felt about change. The literature review also focussed on existing research and theories about organisation change, including current thinking about how and why change can be successful or change fails . Serendipity and chance led me to find these as interesting areas to study (Mills, 2000; Gabriel, 2016b) based on my previous work experience which had introduced me to these areas. So, at the start of my research journey, I had found something interesting that seemed worth investigating and hoped to develop new ideas and approaches (Alvesson and Sandberg, 2013) for approaching change and using stories in organisations to support change. The purpose of this research was not necessarily to fill an existing gap in the literature but to create some interesting research that would challenge existing theory (Sandberg and Alvesson, 2011; Alvesson and Sandberg, 2013).

Sandberg and Alvesson (2011) identify that many researchers look for gaps in the literature when trying to choose potential areas to research. In contrast, they also identify another approach that they call "problematization" (ibid, p. 25) where a researcher identifies areas where they can address existing theory from another perspective or question the underlying assumptions of existing theory (Alvesson and Sandberg, 2013). This approach "endeavour[s] to know how and to what it extent it might be possible to think differently, instead of what is already known (ibid, p. 32) and to "challenge already influential theories" (Sandberg and Alvesson, 2011, p. 25). This, they say, is a lot less common in research, perhaps because researchers feel that they have to conform with preferred academic writing structures, which would include having defined research questions (ibid). They also suggest that it is "easier to construct research questions by spotting gaps rather than problematization" (ibid, p. 25). Other researchers support this way of constructing areas to research, stating that "not just filling a gap in the literature [but] also … changing the way scholars think and talk about the phenomenon" (Bansal and Corley, 2011, p.235) is important in research in creating impactful research (Alvesson and Sandberg, 2013).

By focussing on identifying new directions for existing research rather than simply filling gaps, a greater degree of imagination can be utilised by the researcher. As Mills (2000) puts it "imagination is often successfully invited by putting together hitherto isolated items, by finding unsuspected connections" (p. 201). This is what I aimed to achieve in this research.

Using the Alvesson and Sandberg (2013) and the Sandberg and Alvesson (2011) approach to problemization as discussed above impacted on the way that the research was carried out and also on the structure of the thesis. For example, two literature reviews were undertaken: one at the beginning of the research to understand the area being researched and one after the analysis process to make sense of the themes that had emerged. As discussed above, the initial literature review focussed on change and storytelling as they were the underpinning areas of research and theory that shaped the research. Sandberg and Alvesson (2011) highlight the importance of the researcher familiarising themselves with existing research to ensure that they understand the current assumptions about their subject before beginning any research that aims to challenge these assumptions. It is essential to connect problematizing research to the existing literature so that it has meaning because "a theory is seen as novel and counterintuitive only in relation to what we already know, that is, existing literature (Alvesson and Sandberg, 2013, p. 131).

Following this initial familiarisation literature review and after some data had been gathered, a subsequent literature review was undertaken to investigate the two themes that had emerged from the analysis as these themes directly challenged the underlying assumptions of existing theory. To reflect this two stage literature review, the literature is threaded throughout the thesis and is discussed and reflected upon in every chapter. It is of particular note that the second literature review is referred to in the discussion and findings in relation to the themes that emerged from the analysis. Due to the inductive nature of this research, these themes were not expected or

known at the start of the research and so had not been included in the initial literature review. These themes led to rethinking on my part about how organisation change could be affected by other factors in organisations. As Alvesson and Sandberg (2013) suggest, "empirical material, carefully constructed, thus forms a strong impetus to rethink conventional wisdom and to find input to a possible rethinking of something" (p. 146.) This approach requires the researcher to have fewer divisions between the data that they create and the theory that they are considering and to be reflexive in their approach, hence my decision to thread the literature throughout this thesis (ibid). Therefore, the decision to problematize the nature of failed change in organisations (rather than gap spotting existing research) led to the research being conducted in a particular way and for this thesis to be written in a particular way (Sandberg and Alvesson, 2011).

Sandberg and Alvesson (2011) highlight the demanding nature of this approach, both intellectually and imaginatively for the researcher. Problematization requires that the researcher does not "[follow] procedures, and [use] other work and empirical observations as positive signposts and building blocks to stand on when formulating research questions" (ibid, p.39). In the case of my research, it was based on the idea that there was something "wrong with the assumptions underlying existing studies" (ibid, p. 40) in that some hidden factors were not being considered in change and the research was aimed at discovering what these hidden factors were. Therefore, at an early stage of the development of the research, I utilised my existing knowledge and experience as well as the first literature review to identify the broad aims for the research, with the knowledge that these would develop as the research progressed.

The research aims that emerged from this process were:

1. What stories are told by employees during a change programme?
2. How can these stories help us understand more about the organisation culture and the way the organisation approaches change?
3. How can these insights be used to inform management consulting practice?

Existing research has investigated organisation level factors that can impact on change success, for example culture, leadership and structure. However, little attention has been paid to the role of individual employees in the success or failure of change programmes. In my research, existing research was used to inform the research and act as "an inspiration" (Alvesson and Sandberg, 2013, p. 145) to create the methods and approach to the study (White, 2009).

Once the action research groups had taken place, the key themes of the study were identified through the inductive analysis (Mosonyi, Empson and Gond, 2019). At this point, the research "pivoted" (Hay, Parker and Luksyte, 2020, p. 8) to focus on the role of employee identity and organisation history, with an additional literature review being undertaken to examine existing research in these areas. These areas were the unexpected outcomes from the research as it opened up – "it is the unanticipated and the unexpected – the things that puzzle the researcher – that are of particular interest" (Alvesson and Sandberg, 2013, p. 146).

As Sandberg and Alvesson (2011) state "it is in the crafting of the research text that the final research question is constructed, which is the one that specifies the actual contribution of the study" (p. 25). This is an important aspect of the research to focus on here as, despite this thesis conforming with the standardised thesis structure, I argue that it also shows the reality of the research process in this case. As this research was inductive in nature, only broad themes and aims were identified at the beginning of the research process (and are identified here) yet these developed into quite different themes as the research developed and unfolded, as will be shown as the thesis progresses.

In writing this thesis, I wanted to be open and honest about how the research developed over time and this means having broad aims at the beginning of the research which narrow down into themes during the analysis process. This process of writing will be explored in more detail in section 1.5 of this chapter. However, to summarise, my experience of conducting the research conforms closely with this description from Tracy (2012):

> Many qualitative researchers enter the field with sensitizing concepts and preliminary guiding research questions such as "what is going on here?". However, most qualitative researchers … begin living, collecting and analysing data long before they know the focus of their study or what level of data access they will be able to negotiate. They begin with a life experience and/or a rough idea of topic; they gather data, analyse data along the way, and tag back and forth to the literature to reframe and redirect their study (Tracy, 2012, p.114).

But, this type of research presents a challenge to the researcher when it comes to writing the thesis or a journal article, which require a more conventional structure (Tracy, 2012). This theme will be returned to later in this thesis, when I discuss the writing process in more detail.

1.3   Summary of research approach and theoretical framework

The study was carried out over a 3 year period in a mutual insurance company, UK Mutual, as the company underwent a number of change programmes. This created a climate of change that was hitherto unheard of in the organisation's 100 year history. Stories told about change by employees experiencing it were gathered and recorded through semi structured interviews and action research groups in an attempt to get beneath the organisation rhetoric about change and uncover employee's unheard voices in the change process (Sturdy and Grey, 2003).

As the project took place over a 3 year period, it was possible to interact with the same participants over the period, to determine if their stories changed over time. Alvesson and Sandberg (2013) identify that this form of in-depth case study has become less common in recent years and yet case studies provide opportunities for more creativity than gap spotting research. In addition, this extended duration would discover if there are ways in which to utilise stories and story work (Chlopczyk, 2018) to create different conversations about change in organisations (Driver, 2009). As well as stories, participants were also asked to create drawings and photographs that

illustrated their views about the organisation and the changes that were impacting on them.   The purpose of generating this visual data was to stimulate further discussions on the themes emerging from the action research groups (Silverman, 2013).

A thematic, inductive analysis of the outcomes of the interviews and the action research groups was conducted firstly using NVivo to support the analysis of the whole of the data (Ritchie, Spencer and O'Connor, 2003) and then secondly using the Gioia Methodology (Gioia, Corley and Hamilton, 2013) to work with the data to create an enquiry using these themes (Clark et al., 2010). Following the thematic analysis, a visual analysis of a selection of images created in the study was undertaken in order to more fully explore and interpret their meaning (Gabriel, 2018a).

This research was conducted within the interpretivist paradigm (Burrell and Morgan, 1982). An interpretivist researcher understands that research with human subjects is different to other forms of research (Saunders, Lewis and Thornhill, 2009). Humans are social animals and interpret their own and others' actions based on the meanings that they ascribe to these actions (Saunders, Lewis and Thornhill, 2009). This meaning is based on our own construction of reality which is influenced by our own life experiences and cultural context.

The main focus of interpretivist research is try to and understand these meanings, in the cultural context of the phenomenon being studied (Hudson and Ozanne, 1988; Willis, Jost and Nilakanta, 2007). As a researcher though, we all have our own

assumptions and beliefs that we use to understand behaviour. It is impossible to

separate out the researcher's own reality from the reality that they are studying

(Blaikie, 2007). This reality is socially constructed and subjective to each individual

being studied (Saunders, Lewis and Thornhill, 2009).

1.4   Organisational background

This research was carried out in a single organisation, UK Mutual. This is a

pseudonym as managers within the organisation wished for it to remain anonymous.

Having considered why this is the case, it appears that this is not because managers

were concerned that there might be negative outcomes of the research but because

they feared that it would take too long for me to navigate my way through the

bureaucratic processes that existed if I wished to use the organisation's name. The

key organisational stakeholders that assisted me in the logistics and planning for the

research felt that if the organisation was named in the thesis, then all elements of the

thesis would have to be reviewed and approved by a number of senior management

teams before it could be finalised.

As Weeks (2004) identifies, it is a difficult choice to use a pseudonym as it can be

useful for readers to know the organisation that they are reading about (Rowlinson

and Procter, 1999). Likewise, Godfrey et al (2016) warn about using a pseudonym

and not citing internal sources in the research as it reduces the authenticity of the

research. However, the pseudonym does protect the anonymity of the participants in

the research and the people within the organisation who helped to manage the

logistics of a research project (Weeks, 2004). The participants and the individuals who assisted me in running the research were incredibly supportive and gave up a lot of time to take part in it and I would not wish them to suffer detriment as a result

Despite the wish for anonymity, it is helpful to describe the organisation to add context and describe some of the key characteristics which illustrate what it is like to work at UK Mutual. In doing so, I have attempted to provide enough detail to add context but not so much that the reader could easily identify the organisation. Again, Weeks (2004) highlights the difficulties facing writers using pseudonyms as knowledgeable readers may be able to identify the organisation. Therefore, I have made every effort to conceal identifying attributes.

Two books provided key information about the background of UK Mutual and were used extensively by me to research the history of the organisation. These were published by UK Mutual to commemorate the 75th and 100th anniversaries of the company foundation. The later of these books, the 100th anniversary edition was given to me when I first started conducting my research with UK Mutual as copies had been distributed to all employees in 2010 and were referred to by various participants. The earlier book was found by me, by chance, in a second hand book shop, another moment of serendipity in this research (Gabriel, 2016b). These books have been useful sources to understand the history of the organisation alongside more up to date materials contained on the company website.

It must be remembered though that these books and the website were published directly by UK Mutual and therefore are likely to be biased towards presenting a positive view of the company, focusing on achievements rather than difficulties (Spear and Roper, 2013). As they were targeted at employees, they are also likely to be a method to transmit information and lessons to them from the past (Maclean et al., 2014; Foster et al., 2017; Maclean et al., 2018). Therefore, I recognise that what we can discover about the organisation from these sources is limited as the content is shaped by the underlying culture and assumptions within the organisation (Bliesemann de Guevara, 2014) and this must be considered when using information from the texts. However, this bias does not make them any less valuable as artefacts that illustrate key elements of the organisational culture (Adorisio, 2014; Ybema, 2014).

For the purposes of this introduction to UK Mutual, I have attempted to pull out factual information from the texts such as dates and key events, cross referencing them between the two books and with publicly available information and also by sharing the organisation description with my key contacts at UK Mutual, to ensure that this description is as accurate as possible. I have also tried to avoid taking information from the books that attribute particular status or emotions to events, for example the word 'triumph' is used consistently throughout the books to describe particular events. Therefore, I have attempted here to provide the story of UK Mutual from 1910 to the present day through a description of the key events that have shaped the organisation.

The books have not been referenced directly in this document to ensure anonymity but will be referred to as Book A – 75th Anniversary and Book B – 100th Anniversary where necessary. The content of the books is broadly the same, with updates to the later book to reflect events that had taken place between 1985 and 2010 as well as a more modern layout and use of language. The founding story that is told in both books is identical in terms of dates and key events.

1.4.1 The early years (1910 to 1950)

UK Mutual is a mutual insurance company that was founded in 1910 to provide insurance to a specific occupational group. The story of its foundation is often told within UK Mutual: when potential new joiners are interviewed, during induction programmes and through text, photographs and artefacts in the head office. The story features heavily in both books and I also heard aspects of the story regularly throughout my research, both during the interviews and participatory action research groups. This story has taken on an epic, almost mythical (Gabriel, 2004; Bliesemann de Guevara, 2014) quality and is used to illustrate to new joiners what it means to work in the organisation, during communication events to generate pride in past achievements (Gabriel, 1999; 2000; 2004) as well as helping all those who come into contact with UK Mutual understand what is important about the organisation.

In the books, the story begins with the statement that the idea for forming the company was first discussed in a tea shop and then the company itself was formed in the kitchen of a house owned by one of the seven founder members, who subsequently became the first company Directors and Board members. This room

then became the office of the company, which was run in their spare time by the founder members, to provide insurance and support to others in the same area and carrying out the same work. The initial purpose of UK Mutual back then was to link together an industry that was in severe decline by persuading individuals to join the organisation and then be provided with fire insurance at competitive rates as a member benefit. UK Mutual was founded as a mutual, i.e. owned by its members, and remains a mutual to this day.

The first dedicated office for UK Mutual was purchased in 1920 and the company continued to operate from this address for over sixty years before moving to its current offices. During the 1920's and 1930's, the scope of UK Mutual began to expand beyond its initial local focus to create branch offices in different locations across the country to meet the needs of different towns and communities. Some of the Directors also started to work full time in the business as UK Mutual began to expand nationally through organic growth. Strong growth was reported throughout the 1930's and into the 1940's with more branches opening and increased levels of income and yearly profits.

1.4.2 The post war years (1950 to 1990)

UK Mutual continued to post yearly profits until the 1960's when the first underwriting loss occurred due to unprecedented events in the industry and in the 1970's when falls on the global stock exchange impacted many financial organisations in the UK.

The books state how UK Mutual's prudent decision making and strong financial reserves enabled the organisation to survive these difficult times.

In the mid 1980's, UK Mutual moved to its current head office, which was built specifically for UK Mutual and the company also celebrated its seventy-fifth anniversary, commemorating the event with gifts for all employees. During this period, the Directors of UK Mutual began to consider a change in focus from a specific industry to providing insurance to a wider group of customers. This was partly to reduce the risk of focusing on a specific industry but also to respond to changes in the wider insurance industry such as deregulation. The rapid changes in the industry such as the first Financial Services Act in 1988 required new ways of thinking rather than the organic growth of previous decades. The Act required a more robust compliance regime, which impacted on the structures and processes of UK Mutual. Severe weather events in the late 1980's and early 1990's also led to a spike in claims – the October 1987 storm alone led to over 13,000 claims – and this created greater urgency for the need for change.

1.4.3 The modern era (1990 to today)

Changes began to be implemented in 1992 when UK Mutual in its current form began to take shape, offering a wider variety of insurance policies to existing members and then to the broader population from 1998. UK Mutual also began to be structured differently with appointments of non-Executive Directors from other sectors and requirements for all candidates for promotion to gain professional qualifications

such as the Chartered Insurance Institute and the Association of British Insurers. This focus on staff development continues today and the high numbers of research participants who had professional qualifications, even if they had relatively junior roles, was striking.

The beginning of demutualisation in the mid 1990's was also a difficult time for UK Mutual as many other companies changed their mutual status following the Building Societies Act in 1986. The Act allowed mutuals to become public companies as long as their members approved, broadened the activities that building societies could undertake and created more access to capital (Shiwakoti, Keasey and Hudson, 2008). Members often approved the demutualisation as they received windfall payments or shares in the new company as a result so many members saw this as an attractive option. At this point, the Directors of UK Mutual realised that if they wished for UK Mutual to remain a mutual, members must be able to see the benefits of being part of a mutual organisation, for example through the introduction of competitive insurance premiums, enhanced policy cover and long term discounts for members.

UK Mutual has continued to grow despite pressures in the stock market during the early 2000's and beyond and has posted increases in premiums and new business every year. This is attributed in the texts to the strong financial reserves possessed by UK Mutual. During the research, I asked participants how they felt that UK Mutual had been impacted by the global financial crisis in 2008 and most felt that it hadn't

been impacted severely, despite posting a loss (like many other financial institutions) in 2008.

Since the arrival of a new Chief Executive in 2008, for the first time from outside of the company, UK Mutual has continued to perform well but changes have started to take place which are more radical than in the past, including investment in new technologies and restructuring of the organisation, including some redundancies. This is the first time in UK Mutual's history that such radical changes have taken place and it is against this backdrop that my research was carried out. There are now over 3,000 employees and UK Mutual is one of the top 30 mutual insurance companies in the UK with high levels of customer retention and over 900,000 customers.

1.4.4 The current environment of change at UK Mutual

Since 2008 and the appointment of a new Chief Executive, UK Mutual has experienced a period of change which has been unprecedented in its history, with an acceleration of change since 2012, when the research began. These changes have been far reaching and have included the introduction of new IT systems, the creation (and closure) of regional offices and, for the first time, a programme of employee redundancies. Many of these changes have not been visible to customers of UK Mutual but have focused on increasing efficiency and streamlining customer service operations, for example by creating new IT systems to support claims handling. On top of these process and technology changes, there have also been changes to the

way that employees are managed with an increasing focus on management information and performance management and major training programmes designed to upskill key employee and manager groups, particularly in soft skills such as coaching, giving feedback and recognising and rewarding talent.

Alongside these changes to the ways of working at UK Mutual, the research participants (both from the interviews and the action research groups) suggested that there had been an increasing professionalisation of the way that change has been managed at UK Mutual over the past five years. Previously, when a change project commenced, employees would be asked to work on the project in addition to their regular day job, which resulted in lack of focus and also lack of change management skills. More recently, employees have been recruited to specifically work on projects without being distracted by another role and with the necessary skills and experience to do so. There has also been an increasing use of consultants to support change and bolster the skill levels in UK Mutual.

1.4.5 Insurance sector background

To provide further contextual background, the UK insurance sector can be broken down into three main areas (Webb and Pettigrew, 1999; Poynter, 2000):

- Life insurance (pensions, annuities and permanent health insurance)
- General or non-life insurance (assets of individuals and businesses, for example home and car insurance; liability, accident)

- Reinsurance (insuring other insurers)

The UK insurance industry can be characterised by rapid change during the 1990's driven by legislation, technology, recession and the demutualisation of mutual societies (Poynter, 2000; Grijpstra et al., 2011; McCann, 2013). In more recent times, the industry has had to contend with low interest rates and changes to the regulatory context in which it operates. In the UK, the insurance industry is highly competitive across each of the areas above and consumer choice via the use of comparison websites has led to even greater segmentation and commodisation in the market (Robertshaw, 2012) . In addition, an aging population has led to a change in customer requirements from their insurance provider (Webb and Pettigrew, 1999).

Grijpstra et al (2011) provide a useful definition of what a UK mutual is, in their report on mutuals across the EU, based on information from HM Revenue and Customs:

> A mutual company is a company without shareholders which carries on business on a mutual basis, that is, in such a way that the policy holders are entitled to the surplus arising from the business. However, some companies that are mutual in the sense of having no shareholders may carry on all or part of their business in a way that takes that business outside the legal concept of mutuality, for instance because the policyholders are not members. (Grijpstra et al, 2011, p.79)

Many of the current UK mutual insurance organisations have existed for hundreds of years (for example, Equitable Life was set up in 1762 and LV= in 1843) and were originally set up by groups of people who contributed to a fund which was there to provide financial support during difficult times prior to the existence of the welfare state. Many of these organisations were set up to take care of specific occupations or locations and by the late 19th Century over 27,000 mutual societies had been registered. This number has reduced over time due to amalgamation and demutualisation in the market.

Mutual organisations can take many forms in the UK and there are no specific rules governing their structure (Grijpstra et al., 2011), beyond a requirement for mutuals engaged in financial activity to be registered with the Financial Conduct Authority (FCA) and the Prudential Regulation Authority (PRA). These bodies are primarily for the protection of policyholders (PRA) and to regulate the conduct of all financial organisations (FCA).

The main characteristics that distinguish a mutual from any other financial institution are (Broek et al., 2012):

1. Mutuals are a made up of individuals who own the mutual by providing funds in the form of paying for policies. Therefore, the organisation is owned by the members and the funds are held collectively.

2. Members are given voting rights by virtue of their membership of the mutual and every member is given one vote rather than a number of votes based on how much they have contributed.

3. Any profits are for the benefit of the members and are shared with them by providing discounts, increasing member funds or premium rebates. Profits may also be used to improve the wider community, either where the mutual is located or within a certain sector of the community that is relevant to why the mutual was originally set up.

4. Member benefits are not dependent on the scale of the financial contribution of the member.

5. Membership is open to all who meet the conditions set by the organisation.

Research carried out by Valnek in 1999 in the UK mutual building society and banking sector argues that the specific structures and characteristics of mutual building societies gives them a specific advantages in performance in relation to other financial organisations (Valnek, 1999). Other research has also concluded that mutual life insurers (more directly relevant to the organisation being studied) have advantages over their non mutual counterparts (so called stock or proprietary institutions) through greater efficiency and strong marketing messages to consumers (Letza, Hardwick and Kowalski, 2001).

However, Valnek's (1999) conclusion has subsequently been challenged by further research comparing large mutual building societies before and after they demutualised in the 1990's to compare their financial performance in different

organisation forms (Shiwakoti, Keasey and Hudson, 2008). The authors conclude that the financial performance of these organisations did not worsen after they demutualised therefore, it is not possible to suggest that a mutual structure creates performance advantage (ibid). It is argued that the strong performance of the mutual noted by Valnek in 1999 was due to the dominance of the research organisations in the sector (Shiwakoti, Keasey and Hudson, 2008).

This section has presented a description of UK Mutual and how it was founded, along with a discussion of the key features of mutual organisations and the impact that mutuality can have on organisation performance. I felt that it was useful to include this content because, as this thesis will illustrate, the history of UK Mutual continues to be an intrinsic part of the organisation culture today. In addition, the history of the organisation was referenced many times by the participants and so, I wanted to ensure that any reader of this thesis would be able to put the participant comments in context. There is further detailed discussion of the UK Mutual culture, as discussed by the participants, in section 5.2. Another reason for including this content here is that, as the next section explains, a large part of this thesis is made up of stories and so it seemed appropriate to tell the story of UK Mutual at the beginning of the thesis.

1.5 Thesis structure and writing approach

"…writing with simplicity requires courage, for there is a danger that one will be overlooked, dismissed as simpleminded by those with a tenacious belief that impassable prose is a hallmark of intelligence." (De Botton, 2000, p.159)

Whilst the structure of this thesis follows a standard approach as already described, the way of writing is perhaps a little different. Due to the number of stories and anecdotes that were gathered from participants during the research and their relevance, these stories are often featured throughout the thesis to illustrate key points. This is to provide a rich picture of the context in which the research was carried out (Dyer and Wilkins, 1991) and the recurring themes and findings that emerged throughout the research journey. My approach to writing has been influenced not only by the structure of the research itself but also by other researchers, particularly those following an ethnographical or anthropological path, whose style I admire and whose research is presented in a similar storytelling form, for example, Kondo (1990); Gabriel (1997, 2000, 2004); Van-Maanen (2010, 2011) and Fayard and Van-Maanen (2015).

The way in which the story of the research is narrated in this thesis can be represented as a diamond, with the background to the research described narrowly here in the Introduction, then broadening out in detail and depth through the literature review, methodology and findings before closing down again into conclusions at the end. This thesis is presented over seven chapters, with this introductory chapter being followed by the literature review chapter. As discussed previously, this literature review represents the reading that was undertaken to formulate the research aims and research design. There is a chapter describing the methodology used to conduct the research and then an analysis chapter, illustrating the analysis process and outcomes.

The analysis is presented in a separate chapter to the methodology as, as discussed previously, I "travelled back and forth between data, literature and emerging theory" (Mosonyi, Empson and Gond, 2019, p. 11) as I undertook the analysis. As this was a key part of the development of the themes from this research, I felt that it was important to devote significant space to discussing this in the thesis. The analysis process enabled me to move from "abstract, theoretical constructs" (Hay, Parker and Luksyte, 2020, p. 10) to identifying the core themes that emerged from the study. The analysis process also provided many of the light bulb moments in the study, as I analysed the data and understood what it meant (Tracy, 2012). These light bulb moments can be described as:

> Ephemeral interpretative moments in which various strains of analysis come together to transform and direct the interpretation. The theoretical products that emerge from this practice are different from explanations resulting from conventional deductive analyses that examine data in terms of predefined theoretical constructs or gaps. Theory building is less about confirmation and falsifiability and more about extending, transcending and connecting (Tracy, 2012, p. 124).

With this in mind, the methodology and analysis chapters are presented in detail not to enable them to be reproduced elsewhere in future research, but to tell the story of how the research developed and to explain how these moments occurred.

Two key themes emerged from the analysis – organisation history and employee identity – and therefore the findings and discussions are split into two chapters, to enable equal consideration to be given to each theme. The analysis showed that, in UK Mutual, history and identity were important factors for how employees felt about change, but these had been little considered in existing change programmes. In addition, the participants found it useful to be able to share their feelings about the changes in the action research groups and had not the chance to do this before. Finally, employee identity shifted throughout the change process, towards and away from the organisation and towards and away from others in the organisation. Relevant literature is discussed in these chapters where appropriate, as a further literature review was conducted at this stage based on the outcomes of the analysis. Finally, the thesis finishes with a chapter describing the key conclusions arising from the research.

The completion of this research and the thesis has represented a significant intellectual journey for me as the researcher, from a full time management consultant to a part time consultant/part time researcher with many changes of research subject, focus and approach along the way (Hughes and Tight, 2013). As Kondo (1990) acknowledges, the research forms part of the history of each individual researcher and I want to ensure that the story of how this research unfolded is clear to the reader of this thesis. The metaphor of the PhD as a journey is a common one (Hughes and Tight, 2013) as well as being a classic form of story (Booker, 2004). Hughes and Tight (2013) explain that the PhD journey as a quest is a common metaphor. They also present another story plot as a potential PhD metaphor,

utilising Booker's (2004) story type of a "voyage and return" (p.87). Hughes and Tight (2013) state that this is particularly relevant for a part time PhD, where the researcher journeys into the new world of the university before returning to their normal life. The authors argue that the idea of using metaphors to reflect the process of completing a PhD also encourages the use to storying in a thesis, as I have done here. Hughes and Tight (2013) use the example of reflecting on practice and writing about this in the thesis.

I wanted to write simply and clearly about my topic. This style of writing feels most natural to me, it feels like my voice, perhaps because I am used to writing in a business context. I naturally gravitate towards writers that write in a manner that is accessible rather than impenetrable (Grey and Sinclair, 2006). I feel that I have the opportunity to write differently because I have entered the university from outside and thus can perhaps view academic writing more objectively and critically (Weatherall, 2019). I very much agree with Grey and Sinclair's (2008) plea to "write differently" (p. 448) and have attempted to do so in this thesis. There is a growing argument for writing differently in organisation studies, where this is true to "the actual nature of the research" (Weatherall, 2019, p. 103).

There is more to this than just simply telling a good story though. In her review of classic case studies, Eisenhardt (1991) cautions researchers not to engage readers with an excellent story at the expense of rigorous research methods. "The tension between deploying the method in the correct manner and the invitation to bring personal experience to the analysis of the data is *both* [original italics] an enticing

and anxiety producing prospect" (Clancy and Vine, 2019, p. 207). Thus, this thesis includes detailed methodology and analysis chapters to describe the full range of the research experience.

This research is not ethnography or anthropology as I have not undertaken lengthy participant observation (Saunders, Lewis and Thornhill, 2009) although I was able to conduct the research at UK Mutual over an extended period of time. However, the trope of ethnographic research as a journey (Kondo, 1990) and my desire to fully reflect this journey through the thesis in all its complexity (Hughes and Tight, 2013; Clancy and Vince, 2019), has influenced the way it is written. As this research is about stories, it would also be absurd not to include these stories in the text (Donnelly, Gabriel and Özkazanç-Pan, 2013). Sharing these stories enables "us, as readers, to experience organisational, aesthetic and political processes that are obscured by or intolerable in other forms of academic discourse" (Sinclair, 2013, p. 442). The existing literature in the field of organisational storytelling will now be examined in the literature review in the next chapter.

2   Literature review

"…story is for humans as water is for fish – all encompassing and not quite palpable."

Gottschall, 2012, p. XIV

"Humans love telling stories. We're a species that craves narrative, and more specifically, narrative satisfaction – explanation, a way of making sense of things, and the ineffable complexities of being human – beginnings, middles and ends."

Rutherford, 2016, p. 10

2.1   A brief introduction to the importance of stories to human life

The purpose of this chapter is to provide an introduction to the existing research, literature, theories and debates in the field of organisational storytelling and organisation change that are relevant to this research. This chapter identifies how this existing work has influenced my research and shaped the way it was undertaken. In addition, the use of stories during organisation change is examined, as the organisation being studied was experiencing a period of significant change. It was this that formed the content of many of the stories that were gathered in the research.

This literature review provides a background to the research process and reflects the reading undertaken to shape the research approach and methods. As this research was inductive, a further review of literature was undertaken after the analysis was completed. The themes that were identified during the analysis process were subsequently compared with existing literatures in the field and thus, further literatures are referenced in the findings and discussion chapters.

The definitions at the start of the chapter illustrate how important stories are to us as humans and many researchers and writers have emphasised this in their work (Gottschall, 2012; Küpers, 2013; Yang, 2013; Rutherford, 2016). People have told stories for more than 20,000 years, initially using visual forms such as cave paintings (Monarth, 2014) to share experiences and keep each other safe (Gottschall, 2012; Küpers, 2013; Yang, 2013; Mordhorst et al., 2015; Mordhorst and Schwarzkopf, 2017). Then, stories became oral and can be found in myths, plays, art and in more modern times; written forms and on television (Riessman, 2008). Our early stories helped to transmit information about what behaviours were acceptable (Sintonen and Auvinen, 2009) and prepare for the future, and thus it has been argued that stories have been essential for human evolution (Herman, 2003; Boyd, 2009; Cron, 2012).

Yang (2013) argues that the early human need to use stories to understand the environment increased the rate in which language was developed. He argues that the evolution of language improved the changes of survival if it enabled our early ancestors to communicate threats effectively. Stories are better at doing this than simple gestures and the better storytellers were more likely to have a stronger chance of survival (ibid). Yang (2013) states "…elaborate storytelling must have emerged as an adapted cognitive device for collecting and sharing important social and geographical information, which was critical for our foraging ancestors in terms of the successful exploitation of scattered resources" (p. 135).

Humans are naturally interested in stories as we are social creatures (Monarth, 2014) and research has shown how stories create neurological reactions in the brain (Zak, 2013; Zak, 2014). In his research, Zak (ibid) showed that subjects produced the stress hormone, cortisol, during tense moments in a story and a story with a happy ending led to a release of dopamine, resulting in feelings of happiness. This reaction may explain in part, why we are drawn to stories. Research conducted by Stephens, Silbert and Hasson (2010) found that people listening to life stories had very strong reactions in specific parts of the brain in response to the story. In fact, the activity in the listeners brain mirrored that of the storyteller. This mirroring did not happen when the listeners were only told a series of facts (Stephens, Silbert and Hasson, 2010). Echoing the work of Zak (2013, 2014) the researchers suggest that this mirroring is why stories are such effective methods of communication as they trigger parts of the brain linked to feelings and emotions (ibid). This mirroring reaction is also an essential part in enabling us to understand other people's point of view (Yang, 2013).

2.2   The narrative turn in the social sciences

Recent years have seen an increasing interest in stories and narratives, particularly how these are performed in organisations (Brown, Gabriel and Gherardi, 2009). This high level of academic interest and energy from researchers has been termed 'the narrative turn' (Rhodes and Brown, 2005; Andrews et al., 2006; McCarthy, 2008; Riessman, 2008; Küpers, 2013; Dailey and Browning, 2014; Mordhorst and Schwarzkopf, 2017). Donnelly, Gabriel and Özkazanç - Pan (2013) explain that the

narrative turn expresses the increasing interest in stories either as "… the objective, method or product of study" (p. 5). The narrative turn has focussed on how narratives are constructed by actors within organisations, the methodological issues of gathering these narratives in organisations and what the narratives mean (Mordhorst and Schwarzkopf, 2017).

This movement began in the 1960's, driven by the linguistic turn that impacted all of the social sciences and was linked to a move away from positivism and an increased focus on identity and exploration of self (Rhodes and Brown, 2005; Riessman, 2008). From the 1970's onwards, this movement transferred from a broader social science focus on linguistics to an organisation studies focus on narrative (Czarniawska, 2004). The increasing availability of technology to record voice and image supported this burgeoning interest as well as new ideas being developed for the structure and analysis of narratives. This enabled stories to be gathered and used in research in diverse ways (Gabriel, 2009a). Stories were thus gathered as part of the research rather than being a by- product of the research process (ibid). As more research was undertaken, this enabled stories as research to become more acceptable and legitimate. Such research was often used as a means to open up areas of an organisation that may previously have been inaccessible to researchers (Gabriel, 2015). Now, the huge amount of research that has been undertaken in the field is an illustration of the impact of the narrative turn on organisation research (Rhodes and Brown, 2005; Peirano-Vejo and Stablein, 2009). Since the early 1990's, as organisation change has become an increasing focus, stories have started to be investigated in the context of organisation change (Clandinin and Connelly, 2000).

In her critical review of the early organisational story and storytelling literature, Boyce (1996) concludes that organisation storytelling research initially came from three specific theoretical viewpoints. Firstly, the social constructivist perspective proposes the story as a social construction of reality, whereby our individual reality is created through our interactions with others (Czarniawska, 1997; Abolafia, 2010). This perspective proposes that stories are used in organisations to enable people to understand the organisation culture, create shared meaning (Taylor, Fisher and Dufresne, 2002; Monarth, 2014) and to create individual commitment to organisational strategy (Boyce, 1996). This approach focuses on the individual nature of reality whereby different people will perceive the same situation in very different ways, depending on their own construction of that moment. The researcher explores the conversations that create narrative over a period of time, in order to understand how the narratives are constructed (Abolafia, 2010).

The organisation symbolism perspective suggests that the story is a method to express key characteristics of the organisation. This perspective suggests that stories, jokes and metaphors are used in organisations to promote the organisation culture and perpetuate the symbols and myths that exist within an organisation (Boyce, 1996; Gabriel, 2000). This perspective also focuses on symbols, logos and other organisational artefacts and suggests that organisational stories and symbols can be used for a variety of means such as control or to create meaning, depending on the researcher's viewpoint. Gabriel (2009a) states that organisation stories should be treated by researchers as "in vivo artefacts and to emphasise their importance from the insights they provide" (p. 4). Again, this approach identifies that

different people will attach different meaning to a story or a symbol and Boyce (1996) cautions the researcher about how their own assumptions could impact their analysis if this perspective is used.

The critical perspective uses the story as a means to deconstruct and critique the assumptions and norms that inform the stories told by different individuals within an organisation. Boyce (1996) highlights how programmes that attempt to increase motivation in organisations often use symbols and stories to perpetuate the organisational culture. However, she critiques these programmes as a means by management to manipulate employees. This approach provides the researcher with a means to examine their own assumptions and Boyce (1996) encourages the researcher to use this approach to uncover these assumptions and test how they have impacted their research.

More recently, storytelling has become a common thread in both academic research and management practice, with bookshop shelves being full of titles about using storytelling to improve communication and get marketing messages noticed (Denning, 2004a; Gabriel, 2009b; Forman, 2013; Vaynerchuk, 2013; Callahan, 2016). As Yang (2014) identifies, consultants and business writers are becoming interested in the value that stories can bring to organisations, particularly those going through change (Driver, 2009). Writers such as Denning (2004a) present a "menu of narrative patterns that can be used for different purposes in an organizational setting" (p. 7). This menu aims to provide consultants and leaders with a list of situations in which they could use stories and then prescribe a response on the part of the leader. For example, if a leader wishes to inspire action, Denning (2004a) recommends

content that they should include in the story and even key phrases that they should say. This view of story as a panacea in business has been criticised by other writers (Salmon, 2010) and is certainly not reflected in the academic research, which is far less prescriptive about how stories should be used.

2.3 Defining a story: A major debate in the field

As an introduction to the field of organisation storytelling, it is useful to consider the definition of the word 'story' and whether a story is the same as a narrative. This is more difficult than it sounds as the definition of both terms is "contested" according to Gabriel (1997) p. 857. This contributes to the messiness of the organisational storytelling field (Donnelly, Gabriel and Özkazanç-Pan, 2013). However, it is important for the researcher to explain the definition of story that they will use in their research as this definition will shape the stories that they collect and review in their research (Boje, Bunes and Hassard, 2012). The lack of agreement on the definition of what a story actually is has led to criticisms of it as an area of study as lacking in rigour (Brown, Gabriel and Gherardi, 2009; Cassell and Symon, 2011).

In her book, Riessman (2008) cautions the reader not to expect a clear definition of narrative which she says is used as a synonym for story. Often, as Riessman (2008) suggests, story and narrative are described by researchers as being the same thing (Polkinghorne, 1988; Brown, Gabriel and Gherardi, 2009; Auvinen et al., 2013) and the terms are used "interchangeably" (Beigi, Callahan and Michaelson, 2019, p. 3). Gabriel (2009a) states that narrative and story are seen as "near conceptual neighbours" (p. 4).

Adorisio (2014) provides us with a simple definition of a story or narrative. Here, story is defined as "… someone tells someone else something has happened…" (p.466). The key emphasis of this definition is "… the social interaction…" (ibid), i.e. that to be a story, one individual has to tell another individual something (van Hulst and Ybema, 2020). For Adorisio (2014), the definition of story and narrative is the same. Other writers take a different view, with story being seen as similar but not the same as narrative (Spear and Roper, 2013). For example, Denzin (2006) writes:

> Narrative is a telling, a performance event, the process of making or telling a story. A story is an account involving the narration of a series of events in a plotted sequence which unfolds in time. A story and a narrative are nearly equivalent terms. A story has a beginning, a middle and an ending. Stories have certain basic structural features, including narrators, plots, setting, characters, crises and resolutions. Experience, if it is to be remembered, and represented, must be contained in a story which is narrated. We have no direct access to experience as such. We can only study experience through its representations, through the ways stories are told (Denzin, 2006, p. xi).

In this explanation of story and narrative, we can see that story is defined as a type of narrative, with its own features and structures (Denzin, 2006). This view is supported by other researchers, who see stories as a form of narrative (Beigi, Callahan and Michaelson, 2019). The temporal nature of stories is also emphasised here (Dailey

and Browning, 2014) and researchers such as Vaara, Sonenshein and Boje (2016) note that it is this temporality which marks stories out as being different.

In his much cited definition, Gabriel (2000) defines stories as:

> …narratives with plots and characters, generating emotion in narrator and audience, through a poetic elaboration of symbolic material. This material may be a product of fantasy or experience, including an experience of earlier narratives. Story plots entail conflicts, predicaments, trials and crises which call for choices, decisions, actions and interactions, whose actual outcomes are often at odds with the characters' intentions and purposes (Gabriel, 2000, p.239).

This definition emphasises the way that stories enhance the meaning of facts and contexts whilst not necessarily being factually accurate (McCarthy, 2008; Gabriel and Griffiths, 2011). As Gabriel and Griffiths (2011) state "… the truth of a story lies not in its accuracy but in its meaning…" (p.115). Gabriel (2000) also suggests that stories are more entertaining than narratives and contain more emotional elements (Spear and Roper, 2013).

This definition has been echoed by other researchers, for example McAdams (1993), who defines a story as having a number of common features, including a setting which is explained at the beginning at the story, a set of characters with human or human like characteristics and a plot (Sykes, Malik and West, 2013). This plot will

include a series of causal actions and consequences (Denning, 2004b; Dailey and Browning, 2014), often in the form of a number of sequential episodes and the building of suspense until the eventual resolution of any conflicts or crises (McAdams, 1993; Czarniawska, 1997; Ibarra and Lineback, 2005). These conflicts or crises are seen to be critical parts of a story, with the protagonist's efforts to overcome adversity being essential to great storytelling throughout history (McKee, 2003; Booker, 2004; Campbell, 2008). The sequential telling (i.e. with a beginning, a middle and an end) of the conflict or crises and their eventual resolution is what makes a story meaningful in its entirety (Czarniawska, 1997; Rosile et al., 2013). In addition, the causality between events in the story, which can either implied or explicit, is what makes stories different from other sequential accounts (Dailey and Browning, 2014). Stories are "situated in time or space [and] convey an awareness of when and where the action takes place" (ibid, p.23).

Czarniawska (2004) agrees, stating that "narratives are purely chronological accounts and stories are emplotted narratives" (p. 17). She uses examples of English histories from the medieval period to illustrate this point (Czarniawska, 2008). Early annals and chronicles provided brief dates, characters and events without a plot or detail joining them together. Later histories are written as stories as they are "emplotted" (Czarniawska, (2004), p. 17), i.e. they detail the moves away from equilibrium/stability to instability and then back to a new equilibrium, over time. The story describes this movement as well as the key characters that feature in earlier descriptions (ibid).

It is this causal structure with a protagonist and an end goal that truly engages the listener or reader of a story. Without this, simply hearing about something that happens to someone else (Adorisio, 2014) would not be interesting. As Cron (2012) explains, it can't just be hearing about someone else that is interesting to us "… otherwise we'd be utterly enthralled reading a stranger's … journal chronicling every trip she took to the grocery store ever – and we're not!" (p.11).

The plot structure of a story can be summarised in the diagram below, adapted from Monarth (2014). This structure has been used in stories for thousands of years and forms a common structure for stories from all over the world (Gottschall, 2012):

Fig 1:

Act 3
Climax
(turning point)

Act 2
Complication
(rising action)

Act 4
Reversal
(failing action)

Act 1
Exposition
(inciting moment)

Act 5
Denouement
(moment of release)
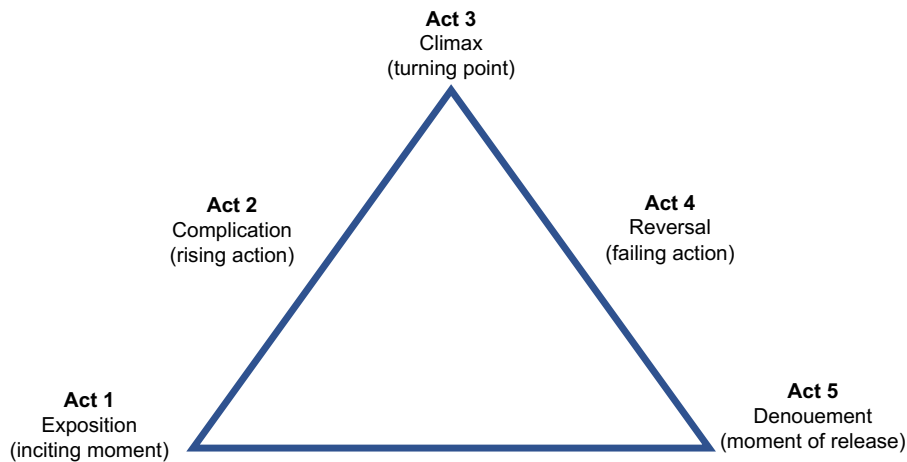
Story plot structure, based on Freytag's Pyramid in Monarth (2014)

So, for many researchers, it is this plot structure that differentiates a story from a narrative and makes a story more fully formed (Lawler, 2002; Driver, 2009). Despite

the many different stories that have been told over millennia this structure is, according to Gottschall (2012):

> the bony skeleton that we rarely notice beneath its padding of flesh and colourful garments. This skeleton is somewhat cartilaginous – there is flex in it. But the flex is limited, and the skeleton dictates that stories can be told only in a limited number of ways. (Gottschall, 2012, p. 52).

This story form is "eternal, universal" (McKee, 2014, p3) but is not a formula.

Boje (2001) rejects this interpretation of a story, stating that a story is something more fragmented (Boje, 1991a; Brown, Gabriel and Gherardi, 2009; Driver, 2009; Vaara, Sonenshein and Boje, 2016) and non-linear in form and can have many different players and narrators. Boje (1991a) explains that he uses this definition of story to enable "more subtle forms of story to be gathered" (p. 8). In his review of his change consulting activities in an office supply firm, Boje (1991a):

> observed that people shared very small chunks and pieces of experience quite frequently, but rarely verbalised a whole story in their everyday, turn-by-turn talk. In fact, just a mere "You know that time?" or a nod of the head was enough to tell those in the know the entire story" (Boje, 1991a, p. 8).

Boje (1991a) states that observing this process in action in the organisation was what led to him creating his own definition of story (Vaara, Sonenshein and Boje, 2016). As he acknowledges, such stories do not fit with other definitions of story and yet he argues that the storyteller and listener are co-creating a story based on what they hear and what they already know (ibid). Therefore, each time a story is told or heard

is a unique performance, with a unique meaning (Boje, 1991b; Boje, 1991a). Vaara, Sonenshein and Boje (2016) note that a story is "an existing narrative that can be told and retold in various forms" (p. 498).

In his later work, Boje develops this concept further, creating the idea of antenarratives which are made up of fragmented, collective, emergent pieces of story (Boje, Haley and Saylors, 2016). These antenarratives are like a speculation or bet on a future story and emerge as a form of sensemaking (ibid). He argues that they can either be a forward facing speculation on the future, i.e. a discussion about what might happen, or a backward facing speculation of the past, i.e. a form of retrospective sensemaking (ibid). This concept of antenarrative will be discussed further in this literature review when Boje's work is discussed in more detail.

A key characteristic of a story that is agreed upon by many researchers is that the telling of the story is an active event for both the storyteller and the audience of the story (Czarniawska, 1997; 1998). Whilst the story does not need to be necessarily factually true, (Ford, 1999; Dunford and Jones, 2000; Brown et al., 2005; Hatch, Kostera and Kozminski, 2005; Cassell and Symon, 2011) it has to be believable to the audience (Eckerling, 2009).

Researchers suggest that a story can be verbal or written but must have two or more participants involved in interpreting it: the narrator and the audience (Taylor, Fisher and Dufresne, 2002; Greenhalgh and Wengraf, 2008), thus there is a collective element of the story (Boje, 2001). It is interesting to consider who tells the story, particularly in organisations. In large organisations, the author and/or narrator of the story, such as the PR or Internal Communications Department, may have some

distance between them and the actual protagonist of the story (Czarniawska-Jorges, 2004). For example, when stories are told about a leader and their achievements and the actual author of the story remains nameless as they will not be credited (ibid).

Researchers disagree about the extent to which stories can apply to all forms of written or spoken language. For Sintonen and Auvinen (2009), the differentiation between oral and written stories is meaningless as oral stories become mythical over time and are "memorialized" (p. 98) into folklore, becoming texts in their own right. According to Mordhorst and Schwarzkopf (2017), there is a "privileging of orality" (p. 1165), where oral stories are given priority over written accounts. Riesmann (2008) and Dailey and Browning (2014) state that stories can take many forms, including oral and written documents, pictures, body language, theatre, art, films, television programmes and historical myths and fables. Similarly, Vaara, Sonenshein and Boje (2016) state that usually written or spoken language is associated with narratives, but other forms of communications should be included, such as visual and audio media.

Given the similarities (and differences) between the various definitions of story and narrative, it is easy to see how confusing the picture becomes and therefore, even more important for the researcher to decide on the definition that they are going to use before they embark on their research. Therefore, in the case of my own research, I have decided to use the Gabriel (2001) definition of a story shown earlier because this seems to be the definition that is accepted by most other researchers in the field. This definition will also enable me to include both verbal stories of change in my research and relevant written accounts, organisation symbols and documents

used as part of the organisation change. Given the history of UK Mutual and the stories that surround its foundation, Gabriel's approach to stories seems most appropriate. He focuses on myth making in organisations (as will be discussed later in this chapter) and his research methods are similar to those used in this study.

I am also interested in some aspects of Boje's work, particularly the idea that a story does not need to be fully structured, but can be fragmented and terse (Boje, 1991b; Boje, 1991a; 1995). It is highly likely that in the research, I will hear fragments of stories that perhaps do not fully comply with Gabriel's (2001) definition. Therefore, I will be mindful of Boje's work and ensure that I gather these stories too and include them in my analysis.

The ubiquitous nature of stories (Greenhalgh and Wengraf, 2008) means that as researchers, we must carefully define what we mean by stories when conducting our research (Boje, Bunes and Hassard, 2012). We must define our own assumptions about the stories that we investigate (Koch, 1998; Gabriel, 2004; Labonte, 2011) and write about in our research, which are stories in their own right (Taylor, Fisher and Dufresne, 2002; Labonte, 2011). Vaara, Sonenshein and Boje (2016) highlight the difficulties and opportunities that the multiple definitions of story and narrative bring to the field. "The epistemological and methodological pluralism provides for a rich body of research but also comes with critical challenges. … We need to have a clear overall understanding of what organizational narratives are" (p. 598).

2.4 Influential researchers in the field

Within academic organisation storytelling research, there are three researchers whose work is regarded as seminal (Yang, 2013; Adorisio, 2014; Mordhorst and Schwarzkopf, 2017). Firstly, Barbara Czarniawska and her 2004 book 'Narratives in Social Science Research'. Secondly, David Boje and his development of the term 'antenarrative' and finally Yiannis Gabriel and his focus on storytelling and myth in organisations. Each of these researchers has created a methodological model for examining stories in organisations and have contributed immeasurably to the field. The differences and similarities of their work will be compared in the sections below.

Czarniawska (2004) traces the increasing interest in narrative to the mid 20th Century, initially beginning in studies of religious texts and folk tales using hermeneutics before moving into organisational research. She states that these early studies were focussed on texts (Lawler, 2002) rather than "the author's intention or the circumstances of the texts' production" (p. 2). Czarniawska (2004) sees narrative as being "the most typical form of social life" (p. 3) and the key way in which we make sense of the world and our place within it (Lawler, 2002). We produce "storied" (p. 242) accounts of ourselves and our relationship to the social world (both within and outside of the research setting) and the social world is made up of stories (Lawler, 2002). Stories also enable people to create their own identity in the world (ibid).

Key to this sense making process is the plot of the story and it is this that gives the story its power, not whether the story is true or false (Bruner, 1991; Czarniawska, 2004). Based on this assumption, Czarniawska (2004) takes a pragmatic view on

the narrative in organisations and states that she does not wish to create a framework within which stories can be fitted or which categorises a story as good or bad. The 'success' of a story is dependent on the situation and cannot be prescribed (ibid).

As discussed earlier, Boje has taken a different view of the nature of story and narrative. He is critical of the idea that stories can be understood individually and argues that multiple voices must be considered (McCarthy, 2008). For him, story making is a collective activity (Boje, 1991a). Consideration must also be given to the how the biases of the story narrator (or researcher) "privileges particular fragments of stories" (ibid, p. 165) and to the context and situation in which stories are collected (Boje, Bunes and Hassard, 2012).

This view of organisational storytelling as "fragmented and distributed" (p. 428) is core to Boje's work (Whittle, Mueller and Mangan, 2009). As highlighted earlier in this chapter where the definitions of narrative and story were compared, he focuses on the fragmentary nature of stories in organisations (Boje, 1991b). In organisations, he argues that stories do not follow traditional story patterns with a beginning, middle and end (Czarniawska, 2004). Instead, stories are interrupted and told in fragments in conversation rather than in grand narratives (ibid). Despite their fragmentary nature, these stories are still rich sources of data, as Boje (1991b) states:

> In organizations, storytelling is the preferred sense-making currency of human relationships among internal and external stakeholders. People engage in a

dynamic process of incremental refinement of their stories of new events as well as ongoing interpretations of culturally sacred story lines. When a decision is at hand, the old stories are recounted and compared to an unfolding story line to keep the organizations from repeating historically bad choices and to invite the repetition of past successes. In a turbulent environment, the organization halls and offices pulsate with a story life of the here and now that is richer and more vibrant than the firm's environments. Even in stable times, the story is highly variable and sometimes political, in that part of the collective processing involves telling different versions of stories to different audiences. Each performance is never the completed story: it is an unravelling process of confirming new data and new interpretations as these become part of an unfolding story line (Boje, 1991b, p. 106).

As the quote above highlights, Boje's view of stories as fragments creates a different approach to time within stories. Instead of a linear approach, Boje suggests that stories are told both backwards and forwards, reflecting on the past but also creating the future and that stories are told differently at different times (Gabriel and Griffiths, 2011; Beigi, Callahan and Michaelson, 2019). This fragmented approach to stories is supported by other researchers such as Sims et al (2009). In their review of the remembering of leadership presentations, they had assumed that stories would be remembered best, i.e. accounts with clear beginnings, middles and ends (ibid). In fact, their research showed that it was actually the "snippets of stories" (ibid, p. 385) which were more often remembered by listeners.

Rosile et al (2013) further illustrate the connection between story, narrative and antenarrative. They state that "storytelling is the interplay of grand (master) narratives (epistemic or empiric) with living stories (their ontological web of relations). Antenarratives make a process connection between narratives and living stories" (p. 2). Therefore, for Boje, storytelling in organisations is a mix of organisation wide stories and smaller everyday stories told and lived by individuals. Antenarratives, or story fragments, are the link and connection between the two (Boje, 1991a). They act as a kind of shorthand, based on existing knowledge. For Rosile et al (2013), this definition is the most suitable as it enables all voices within an organisation to be heard.

Boje also considers that stories have many authors (Gabriel and Griffiths, 2011), with stories being refined and developed as they are told across an organisation. Whilst other researchers have supported Boje's concept of fragmented stories, his approach has been criticised. For example, Whittle, Mueller and Mangan (2009) argue that "his focus on incremental refinement suggests a somewhat unitary view of organizational life" (p. 428). They claim that it is important to focus on what happens when different stories are in conflict with each other, particularly during periods of change, rather than Boje's focus on how different individuals work together to refine stories told by others. During periods of change, conflicting stories are common as there is usually more than one interpretation of the situation (Whittle, Mueller and Mangan, 2009).

In a 2014 book review, Yiannis Gabriel is scathing of "the anorexic proto stories, the withered narrative scraps that (not without reason) fascinate many organisation theorists of today" (p. 579). It is unclear which theorists he is referring to here although I suspect it might be Boje. In contrast, Gabriel focuses on the richness of stories in organisations, both in terms of what can be classed as a story and also how stories can be defined in classical terms. Gabriel (2000) description of proto stories as "narratives that have the seed of a story without actually achieving the poetic imagination and narrative complexity that would make them proper stories" (p.60) further illustrates his approach. For him, a story needs to be detailed and imaginative and complex in order to qualify as a real story (McCarthy, 2008).

Researchers such as Czarniawska (2004) have argued that Gabriel takes a narrow view of what constitutes as a story as other narratives such as opinions and reports would not be included in his analysis. Because Gabriel defines stories by their effect, for example the purpose of a story is to entertain or to create emotion (Gabriel, 2000), he would not include opinions or reports in this definition (Rosile et al., 2013).

As Whittle, Mueller and Mangan (2009) note, "accounts, claims or allegations" (p.438), that are meant to be objective rather than entertaining, would not be considered a story by Gabriel. Whittle, Mueller and Mangan (2009) disagree as they argue that acts of speech should be stories as they can "attempt to portray different 'objective' pictures of events … and can *also* [their emphasis] be understood as stories with particular moral orders" (p.438).

In his work, Gabriel has undertaken a structural analysis of stories to create a typology which, in his view, can be applied to most stories (Gabriel, 2000; 2004; Gabriel and Griffiths, 2011). This typology includes four types of story: comic stories which can be at the expense of groups or individuals, where there is misfortune (which is deserved by the protagonists) and which are funny and also critical (ibid). Epic stories which tell of achievement against adversity, often told with pride and admiration (ibid). Tragic stories which also tell of misfortune, but this misfortune is not deserved by the protagonists. These stories often feature villains and can be further classified as gripes (small levels of tragedy) or traumas (large levels of tragedy) (ibid). And finally, romantic stories which focus on love and being kind (ibid).

There are significant differences in the three researcher's treatment of plot in their studies. For Gabriel and Czarniawska, organisation stories must have plots, meanings and characters (Gabriel, 2009b; Beigi, Callahan and Michaelson, 2019; Dawson and Sykes, 2019). Czarniawska (2004) takes a broader definition of story than Gabriel, arguing that even texts that don't look like stories, for example a report, will still have an underlying plot. For Boje, a story only exists in the moment it is told and does not need to have a fixed plot or characters. As Gabriel (2015) argues, for Boje a story has "no agreed text, only variations and varieties surfacing in each unique performance" (p. 3).

The way in which stories are gathered through the research is also different. Gabriel and Czarniawska use interviews to elicit stories rather than extensive field research (Czarniawska, 2004; Whittle, Mueller and Mangan, 2009). Other researchers support

Boje's methods of field research. For example, Whittle et al (2009) argue that more attention needs to be paid to the small stories that can be gathered outside of the interview situation (Clifton, 2014) in informal interactions (Fayard and Weeks, 2006). These stories are found within every day talk and make up a large part of how identities are formed in organisations. According to Clifton (2014), these stories are "embedded in talk – in interaction" (p. 100).

In comparison to Gabriel and Czarniawska, Boje has extensively focussed on small stories which he has gathered through observation and which are told by marginalised voices in organisations. He argues that silenced voices can be heard through antenarratives or story fragments (Boje, 2001; Boje, Alvarez and Schooling, 2001) which ignore organisational power and politics. In his 1995 study, Boje illustrated how at an organisational level, positive tales about Disney were highlighted whilst negative ones were suppressed. However, the smaller stories and antenarratives told within the organisation continued and did challenge existing power structures (ibid). His multi authored approach enables different authors to contribute different parts of the story (Gabriel, 2015), meaning that many voices can be heard. Boje argues that stories are dispersed within organisations and can travel across organisations (Gabriel, 2016a) and will be interpreted differently by different receivers of groups (Sintonen and Auvinen, 2009).

In contrast, whilst Gabriel (2005) has suggested the unmanaged organisation as a place for rebellious stories in organisations, these stories do not challenge power structures, they merely try to "sidestep" them (p. 5). This is a subtle difference but an

important one. The unmanaged organisation is a space that is separate from management control (Gabriel, 2018b). Gabriel (2016) has identified that these rebellious stories or counternarratives can spring up in relation to a master narrative and may reflect marginalised voices in an organisation but they still have the structure of other stories in that they are plotted, have characters and a beginning, middle and end.

There are some similarities here between Gabriel (2000) and Boje (2001) according to Rosile et al (2013). In their paper, the authors have created a conceptual model, the storytelling diamond, where they have identified a number of paradigms that feature in organisational storytelling research (ibid).   The model was created to assist researchers in determining how they wish to approach a storytelling enquiry based on their answers to a number of questions concerning methodology, ontology, epistemology and practice. In the paper, Rosile et al (2013) identify a number of similarities and differences between the work of Czarniawska, Boje and Gabriel. According to Rosile et al (2013), both Boje and Gabriel take a "collective and inclusive" (p. 2) view of the creation of story in dialogue. Here, participants in the story work together to create the story. Rosile et al (2013) contrast this view with Czarniawska (2004) who, they claim, focuses on a "centering and cohesive force of petrified narrative" (p.2). Therefore, Czarniawska's definition of story allows less involvement of multiple authors in a story and the story is fixed in a particular location and space in time. Rosile et al (2013) suggest that this may be due to Czarniawska's (1997) narrow idea of what can be a story with only some stories counting as having a "meaningful whole" (Czarniawska, 1999, p. 2). Boje (1991a) also comments on

Czarniawska's (2004) "petrified narratives" (Rosile et al, 2013, p. 2) explaining that these are the grand narratives that exist at an organisational level and do not represent stories told in other parts of the organisation or by other stakeholders.

There are significant differences in the way that the three researchers treat time and temporality in their approach to stories. Dawson and Sykes (2019) contend that Gabriel takes a linear approach to time, with stories having a "recognisable beginning, middle and end" (p. 98). Czarniawska too emphasises the need for these elements to be in place in her definitions of story. For Gabriel (2000), "stories unfold in the moment and speak to their audiences in order to be relevant, contextualised and inspirational" (Rosile et al, 2013, p. 3). Therefore, whilst there is a linear element to Gabriel's stories, they are also relevant in the moment that they are told or constructed (Bruner, 1991).

In contrast, Boje has moved away from traditional linear timelines for storytelling to a "less consolidated web of rough living stories" (p. 98) without a rigid structure or fixed meanings (Sintonen and Auvinen, 2009). For Boje (2008), stories can have many authors and have a life of their own beyond the moment the story is told (Rosile et al, 2013). Dawson and Sykes (2019) suggest that his approach has changed over time. For Boje, antenarrative provides a bet for the future and is a "future orientated way of sensemaking that can shape future outcomes" (ibid, p. 100) and thus, doesn't have to have a formal structure (Boje and Smith, 2010). Highlighting his later research, Dawson and Sykes (2019) argue that Boje's approach has shifted towards a more "performative approach" (p.100).

Dawson and Sykes (2019) argue that these differences may in part be related to the different theoretical perspectives of Czarniawska, Boje and Gabriel. Gabriel approaches stories from a "conservative, traditional, Aristotelean position" (p. 98) with a strong interest in myth and folklore which he applies to organisations (Gabriel, 2004). In comparison, Boje gains insight and influence from non-organisational studies fields such as quantum mechanics (Dawson and Sykes, 2019) and post-modern narrative theory (Boje, 2008; Sintonen and Auvinen, 2009).

2.5   Current themes for research into stories in organisations

Early organisation storytelling studies tended to focus on how stories about the past were used to creating a shared understanding of the organisation (Boje, 1995; Rhodes and Brown, 2005; Ravasi, Rindova and Stigliani, 2019) and to control employee behaviour (Dailey and Browning, 2014). In his 1995 study, Boje presents the example of a Disney executive (Michael Eisner) retelling a story originally told by Walt Disney, to persuade the board to support a strategy that he wished to implement (Dailey and Browning, 2014). Here, Eisner was trying to link the current strategy and identity of Disney, with that of the past by using stories (ibid). This would enable the strategy to have more credibility in the eyes of others and it would be more likely that the Board would support his strategy (Ravasi, Rindova and Stigliani, 2019).

More recent research suggests a wider variety of reasons for why researchers are interested in stories in organisations (Dailey and Browning, 2014). In their review of the organisation storytelling literatures, Rhodes and Brown (2005) propose that there are five key areas of inquiry covered by the literatures. They state these five themes as sensemaking, communication, learning/change, politics and power and identity and identification (ibid). I argue that there is a degree of overlap in the categories developed by Rhodes and Brown (2005). Whilst they are useful in reviewing the key studies and themes in the field of organisational storytelling, there is an underlying theme of sensemaking throughout, which means that this category could be combined with others.

In their own review, Beigi, Callahan and Michaelson (2019) confirmed the findings from Rhodes and Brown's (2005) review but noted that as well as the five key themes identified in the earlier study, research since 2005 has tended to be more critical. These later studies do not simply gather stories and analyse them, instead they take a critical perspective, challenging power structures and assumptions (Beigi, Callahan and Michaelson, 2019). This, they say, is evidence of the huge growth in the field between 1990 and 2015, and this growth can be vividly seen in the exponential increase in studies undertaken between these dates as shown in the data table on page 7 of their article (ibid). Beigi, Callahan and Michaelson (2019) welcome this critical turn, explaining that to date, reviews of the field have tended to focus on either "classifying types of stories and research designs in storytelling or synthesising the thematic findings of studies that focus on organizational storytelling

or a specific aspect of it" (p. 2). Despite this observation, the authors endorse the

Rhodes and Brown (2005) categorisation of story in organisations (ibid).

In my own review of the literature below, I have chosen to combine some of Rhodes

and Brown's (2005) categories together. This, I argue, allows greater differentiation

between the different categories and reduces the repetition of the sensemaking

theme, which runs throughout. I have also separated out the change category from

Rhodes and Brown's (2005) broader category of learning and change. There is a

vast amount of research in the area of change and storytelling that has been

undertaken in recent years and thus, I believe that this should be represented in a

separate category. In addition, as the focus of my research is on gathering stories in

an organisation undergoing change, it is appropriate that this should have a greater

focus in this literature review.

2.5.1   Sensemaking and communication

Research into organisational storytelling with a sensemaking perspective focus on

how organisations are made of up narrative constructions (Bruner, 1991; Rhodes and

Brown, 2005). Stories as a sensemaking tool is also an area that has been much

explored by researchers. Rhodes and Brown (2005) provide examples of the high

level of agreement amongst researchers of the narrative nature of reality construction

(Bruner, 1991) and how stories are used to interpret and make sense of this reality

(Boje, 1995; Gabriel, 2000). Citing Weick (1995), Rhodes and Brown (2005) argue

that "stories are pivotal to sensemaking because they aid comprehension, suggest a

causal order for events, enable people to talk about absent things, act as mnemonics, guide action and convey shared values and meanings" (p. 170).

Other researchers have provided specific examples of how stories have been used in organisations to enable sense making. Stories can be used as a metaphor for a specific situation (Czarniawska-Jorges, 2004; Küpers, 2013), for example describing two departments as being 'at war' with each other (Collison and Mackenzie, 1999) or describing a company as being like a family (Gabriel, 2000). Much of this sensemaking is to enable employees to cope with and understand the complexity of organisational life (Rhodes and Brown, 2005; Hay, Parker and Luksyte, 2020). Therefore, researchers such as Czarniawska (2004) emphasise the temporal nature of stories, with sensemaking changing over time and as the story unfolds (Rhodes and Brown, 2005).

Stories can also be used to communicate information in a way to make it more memorable. Researchers highlight how there may be multiple ways of making sense of the same information, due to the individual realities of each listener or receiver of this information (Rhodes and Brown, 2005). For example, Sims, Huxham and Beech (2009) use the term "sensetaking" (p. 376) rather than sensemaking in their research, highlighting how listeners to stories told in presentations will take what they want from the presentation to make sense of it, rather than remembering all of it.

Stories can be used in organisations as a tool (Beigi, Callahan and Michaelson, 2019) of communicating complex information, often in the form of a biographical and/or anecdotal story (Collison and Mackenzie, 1999; Taylor, Fisher and Dufresne,

2002; McKee, 2003; Lee, 2012). These stories are told by people in organisations to share information about past or future events and as a means to share ideas about organisational culture (Boje, 1991a; Rhodes and Brown, 2005). Rhodes and Brown (2005) highlight the important role that communication stories have in "assembling and reassembling events as they are experienced into meaningfully temporalized narratives through which symbolic meaning and causal explanations can be inter-subjectively discussed, contested and (perhaps) agreed upon" (p. 172). As with stories as sense making phenomena, there may be multiple meanings that are inferred from these stories. Rhodes and Brown (2005) argue that this means that within organisations, there may be no agreed meaning for stories and thus, some stories will dominate and others will be unheard (Boje, 1995).

In their review of the field, Beigi, Callahan and Michaelson (2019) whilst supporting the views of Rhodes and Brown (2005) that stories assist with sensemaking, also add another element. In more recent studies, Beigi, Callahan and Michaelson (2019) report that they have noticed a "more volatile process that we call 'subverting' that arises when individual and organizational narratives misalign and cannot be easily reconciled" (p. 8). They report that, in direct contrast to conventional sensemaking through the bringing together of different stories, "subverting" (ibid, p.8) involves a smaller story deconstructing a larger narrative. From this deconstruction, a "new, shared story" (ibid, p. 8) can emerge. Similarly, they also identify a similar trend for critique and deconstruction in the area of communication, citing the study by Auvinen et al (2013) which is discussed in the section below as an example of how stories can be used not to communicate but to manipulate (ibid).

2.5.2 Politics and power

Drawing on the work of Boje (1991, 1995, 2008), Auvinen et al (2013) state that "often charismatic (effective) leadership and storytelling are intertwined" (p. 418). They claim that a key role of the leader is to tell stories, and whilst some leaders are better at this than others, it is a key organisation behaviour (ibid). The leader as a charismatic storyteller formed a key part of early leadership theory and the narrative turn, but only now is this concept having a resurgence (Denning, 2004a; b; 2007; Gabriel and Griffiths, 2011; Auvinen et al., 2013). Boje (1991a) provides examples of a leader in an office supply firm using his knowledge of the stories that predated his time within the firm, as a form of persuasion. The leader used the stories, even though he was not in the organisation at the time that the events told in the stories actually happened, to support points in his arguments for organisation change (ibid).

Auvinen at al's (2013) study built on the work of Riessman (2008) to show that leaders used stories to manipulate and mislead others and influence their behaviour. These manipulative stories were used to exert power over others and the participants of the study felt that this was acceptable as it avoided having to force or coerce people to behave in a certain way (Auvinen et al., 2013; Beigi, Callahan and Michaelson, 2019). There was a risk if the leaders were caught behaving in this way, but the study showed that individuals felt that it was worth the risk to their reputation (ibid).

As suggested above, stories are increasingly used as a management tool (Brown et al., 2005; Sintonen and Auvinen, 2009; Beigi, Callahan and Michaelson, 2019). However, researchers such as Sintonen and Auvinen (2009) ask whether it is possible for a leader to control how their message is received by a receiver or listener. Citing examples of when stories have been used to attempt to control behaviour by sharing accepted behaviours, Sintonen and Auvinen (2009) claim that stories can be considered to have "the power to lead" (p. 101) as they "sediment in the organisation" (ibid). By this they mean that the stories become wider reaching than their initial telling, becoming part of the way everyday tasks are done in the organisation, and it is this that can create opportunities for power and control. They argue that the public telling of a story can be heard by many more people than were originally involved in the incident being discussed and thus the story "creates organisation wide membership which no longer requires presence in the original situation" (ibid, p. 106).

In contrast, Beigi, Callahan and Michaelson (2019) once again point to more recent studies where storytelling is not used as a "device to maintain and consolidate political power" (p. 10). Instead, studies have shown that there may be many competing stories within an organisation which can highlight differences between the views of leaders and employees (Brown and Humphreys, 2003; McCabe, 2004; Boje, Haley and Saylors, 2016; Beigi, Callahan and Michaelson, 2019). Boje et al (2016) argue that these different stories exist in all storytelling organisations and will either help or hinder change in the organisation, depending on how they relate to other organisational messages. This is similar to the work of Brown and Humphreys

(2003) where stories were seen as either epic or tragic, depending on the viewpoint of the receiver of the story.

The way in which these different stories are received in organisations, if they are identified, can have a significant impact on organisation ways of working (Beigi, Callahan and Michaelson, 2019). This echoes the findings of Boje and Baskin in 2011 who argue that it is necessary to undertake activities to gather stories from both above and below in organisations in order to understand employee feelings towards the organisation (Magala, 2011). They argue that managers use stories to create engagement (or enchantment as they call it), with the organisation by promising a brighter future (Boje and Baskin, 2011; Magala, 2011). At the same time, employees become engaged with the organisation through the relationships and communication networks that they themselves create in the organisation, beyond the influence of management control (ibid). Boje and Baskin (2011) argue that disengagement (or disenchantment) with the organisation emerges as a result of overriding organisational narratives which are separate from the day to day stories that employees encounter whilst they are work (ibid). Therefore, in order to understand the complexity of this, researchers must gather stories from a wide variety of sources in organisations, and not just from agreed organisational narratives.

2.5.3 Learning and knowledge sharing

Yang (2013) claims that stories are used as a means to share knowledge in organisations and draws a comparison with tribal societies where elders are the

repository of tacit knowledge which they share with younger, less experienced members of the tribe. In many large organisations, storytelling is used as a key part of induction and training (Carter, Goldsmith and Ulrich, 2005). Here, according to McCarthy (2008) stories are used for either "grounding or instruction" (p. 164) to clarify key organisation values and explain how things are done. The purpose is to encourage commitment to the organisation (ibid) and to bond individuals into "communities of practice" (Yang, 2013, p. 164).

Maclean et al (2018) studied the history of Proctor and Gamble by reviewing and analysing archived annual reports and leader's speeches. They also conducted interviews with senior managers to obtain a mixture of oral and written stories. They concluded that the purpose of these stories was to introduce new employees to the values of the organisation and to "invent traditions" (ibid, p. 11). These traditions were an attempt to link specific products and values to myths (Ybema, 2014) about the early days of the company in order to provide "historical exemplars" (ibid, p. 13) for future activity and behaviour.

Stories can be also used in other ways to encourage learning and enable people to try out new ways of thinking in a risk free way (Collison and Mackenzie, 1999; Syedain, 2007; Lee, 2012). Beigi, Callahan and Michaelson (2019) identified many instances of stories being used to support learning and change in their review of the field. In common with other critical studies, the authors highlight the difficulties in legitimising stories that are not congruent with the broader organisational narrative and suggest that this may represent a significant barrier to change in organisations.

In particular, where organisations fail to recognise or discuss other narratives, this reduces the ability to be open to new ideas (ibid).

2.5.4 Identity

Existing research has shown that stories are important in organisations to create and share both individual and organisational identities (Rosile et al., 2013; Hay, Parker and Luksyte, 2020). Telling stories about the organisation can be a way to create a shared history in the organisation (Seaman and Smith, 2012; Maclean et al., 2014; Ybema, 2014; Maclean et al., 2018) and transmit values (McCarthy, 2008; Sintonen and Auvinen, 2009). Alternatively, stories might also be told to reminisce about how good things were in the past before things changed (Gabriel, 2000; 2004; Hatch, Kostera and Kozminski, 2005). Ybema (2014) argues that historical stories in organisations cannot tell us much about the past, as they are constantly reworked to fit with what employees are most concerned about in the present. "At best, organizational members offer little more than terse stories or a helicopter account of their collective history that flies fast from founding fathers to present day heroes" (ibid, p. 497).

These stories may also form part of the invented traditions (Maclean et al., 2014; Ybema, 2014) referred to earlier and can be used to create a sense of continuity of identity during periods of change (Rhodes and Brown, 2005; Beigi, Callahan and Michaelson, 2019; Hay, Parker and Luksyte, 2020). Stories can be used during times of change to emphasise the distance between the past, present and future. For example, creating a vision of a golden age in the past and a more negative future

may invoke a nostalgic mood and create negative feelings about a change (Gabriel, 1993; Ybema, 2014; Foster et al., 2017; Gabriel, 2018d). In contrast, Foster et al (2017) cite examples of leaders, wishing to convey how great the future of the organisation is going to be, telling stories which emphasise the negative aspects of the past. These stories emphasise how the organisation identity will "rupture with the past to welcome a new present" (ibid, p. 1181).

As a way of creating an organisation identity (Sintonen and Auvinen, 2009), stories are used in many forms to express something important or valuable about the organisation to the outside world, for example through advertising, websites and official documents which provide examples of achievements and successes (Gabriel, 2004; Lee, 2012; Maclean et al., 2014; 2018). This building through story (Yang, 2013) is an important way of sharing the organisation identity and values with others and can be a means of managing the reputation of an organisation with external stakeholders (Aula and Mantere, 2013). As Bliesemann de Guevara (2014) notes, "storytelling and other forms of oral or written history are an integral part of constituting and maintaining an organisation's espoused beliefs and values" (p. 619).

Stories can be used to describe specific individuals in an organisation, be it individual roles or specific groups (Shaw, 2002; Sims, 2005; Whittle, Mueller and Mangan, 2009) and present them in a specific light. For example, consultants have been variously described as predators, witchdoctors, con artists (Fincham, 1999; Lapsley and Oldfield, 2001), mechanics, doctors (Czarniawska-Jorges, 2004) and psychotherapists (Furnham, 2004). Successful leaders are described as being artists and priests (Hatch, Kostera and Kozminski, 2005) or described as having the

charismatic characteristics from the stories of past leaders such as Alexander the Great (Grint, 1997; Czarniawska-Jorges, 2004; Kurke, 2004). Individuals may also use stories to cast themselves in a particular light, for example to save face after an error has been made (Whittle, Mueller and Mangan, 2009).

2.6   Stories and organisation change

2.6.1   An introduction to the change management literature

There has been a huge volume of literature related to the management of change in organisations, from major corporate restructurings to managing new technology to changes to structures and ways of working (Huy, 2001; Andriopoulos and Dawson, 2009). Much of the popular literature in this area has focused on providing tools and techniques for managers and change agents to use to manage change successfully in their own organisations (Fernandez and Rainey, 2006; Kotter and Rathgeber, 2006; Alfes, Truss and Gill, 2010). This literature assumes that change is something that can be successfully 'managed' (Huy, 2001).

In the academic arena, research has focused on synthesising the various change theories, explaining key aspects of organisational change such as power relationships and management styles or on the investigation of change management practice in specific organisations (Cockman, Evans and Reynolds, 1999; Andriopoulos and Dawson, 2009; Alfes, Truss and Gill, 2010). Even in the academic field, the focus on step by step guides for change is still evident (Langley et al., 2013). For example, Huy (2001), provides a model of four ideal types of change

intervention (based on the existing literatures) and proposes actions that can be taken to achieve success.

Many of the tools and techniques suggested for managing change suggest taking a structured approach to the change process. These approaches have a series of steps and activities which, if undertaken by a leader and/or a team of change agents (Arrata, Despierre and Kumra, 2007; Burnes and Jackson, 2011), will lead to success (Kotter and Cohen, 2002; Bridges, 2003). These planned change (Rosenbaum, More and Steane, 2018) approaches have been taken up and used extensively by consultants, both internal and external as part of their tool kit and as a means to provide legitimacy for their work (Fincham, 1999; Alfes, Truss and Gill, 2010). As a result, the role of the external consultant has grown extensively as a profession in its own right (McKenna, 2006).

Rosenbaum, More and Steane (2018), in their useful review of the literature of planned organisation change, highlight the volume of change models that have been developed since the mid 20th century each of which have a number of differentiating factors. Models exist which differentiate between types of change: whether change is planned or emergent, whether change is top down or bottom up and on the size and impact of the change (ibid). In their paper, Rosenbaum, More and Steane (2018) argue that such models of planned change focus either on governing change by providing "specific approaches or steps that change agents and those who initiate change must address" (p. 289) or are structural in that they "offer more of an overall framework within which change takes place" (ibid). Examples of these different

approaches are shown in the table overleaf to illustrate the various aspects of the

planned change literature (adapted from Rosenbaum, More and Steane, 2018):

Table 1:

Approaches to manage change through a series of specific change steps			
Model	**Author**	**Key characteristics**	**Rosenbaum et al (2018) observations**
Three step model	Lewin (1947)	Change is a process of three stages – unfreezing the current state, creating a new state and then freezing the new state	The original change approach which is directly linked to other planned organisational change approaches
Eight step model	Kotter (1996)	Based on research in a large number of organisations, led to the development of key lessons to be applied to other organisations experiencing change	The approach of Lewin has evolved to view change as a project to be managed
Approaches to create a change framework			
Model	**Author**	**Key characteristics**	**Rosenbaum et al (2018) observations**
Change curve	Kübler-Ross (1969)	Based on the experiences of grief, the change curve highlights the emotional reactions to change and gives ideas for responding to these	Further evolution of approach to include more focus on the human reactions to change. Change is seen as a "response to resistance" (p. 297)
Transitional phase model	Bridges (1991)	A 3 phase model with a particular focus on creating an end state and taking action to move to that point	Further evolution to view change as a process of interpretation and sensemaking

Categories of planned change literature, adapted from Rosenbaum, More and Steane (2018)

Despite the volume of literature and study relating to change management, the majority of change programmes in organisations fail (Hamlin, Keep and Ash, 2001; Hay, Parker and Luksyte, 2020), with some authors arguing that this figure may be as high as 70% (Kotter, 1995; Langer and Thorup, 2006; Keller and Aiken, 2008; Burnes and Jackson, 2011; Rafferty and Restubog, 2017). The accuracy of this percentage has been questioned (Hughes, 2011; Thomas, George and Rose, 2016; Rosenbaum, More and Steane, 2018) and it has been argued that it is difficult to define the effects or success of a change programme through quantitative means (Hughes, 2011; Labonte, 2011). Hughes (2011) suggests that are a number of reasons why change success is difficult to measure or define. Firstly, existing research into organisation change success examines organisations at a specific moment in time, rather than measuring the outcomes of a change (good or bad) over time (ibid). Secondly, every organisation is different and so what success looks like will also be different between each organisation (ibid). Finally, there will be different interpretations of change success for each organisation, from both within and outside of the organisation (ibid). Despite these difficulties though, there is agreement that failure is a significant problem for many change programmes.

The causes of this high failure rate have been attributed to many reasons (Thomas, George and Rose, 2016), mostly the overly rational nature of many change management techniques. Critics have suggested that these approaches do not reflect the irrational side of human nature (Cockman, Evans and Reynolds, 1999; Keller and Aiken, 2008) or the current rapid scale of change (Clandinin and Connelly,

2000), and do not provide the answer to long lasting change (Andriopoulos and Dawson, 2009).

The impact of human nature and other factors on change has been considered by some researchers. Rafferty and Restuborg (2017) argue that the organisational context of change and the impact that this has on success has not been fully investigated. The authors suggest that employee perceptions of the change history of the organisation can have a significant impact on how they view change (ibid). Some employees will view change as "resulting in a potential loss or as presenting a danger to one's well-being with negative implications for the future [whilst] other employees may perceive change as enhancing opportunities for growth and development" (ibid, p. 534). In many models, employee views on the history of change are not gathered or analysed to determine how this might impact on the change programme. For Rafferty and Restuborg (2017), a key finding from their study was that "when employees report[ed] that previous change efforts in that company have not been successful and have been poorly managed, they are less likely to report that current changes present an opportunity for growth" (p. 541). This finding was even greater for older employees or those with a long period of service with the company (ibid).

On a similar note, Burnes and Jackson (2011) and Thomas, George and Rose (2016) identify the impact of employee values on the success (or failure) of a change programme. The authors note that change interventions are more likely to be accepted by employees if the underlying values of the change intervention are in accordance with the values of the employees (ibid). Whilst there may be other

factors at play which determine the success of the change programme, Burnes and Jackson (2011) argue that this may be a topic for further consideration and research to determine the impact of values on success.

In his study of change in the NHS, Conroy (2010) identified how important it is for leaders to understand the real world of people experiencing change, in order for the change to be successful. He critiqued existing organisational theory as being "structural functional in nature … a set of qualitative factors or models of change that offer a guide to practitioners of what 'levels' to focus their attention on. The belief is that by pulling or pushing on these levers, change can be controlled and stable outcomes predicted" (ibid, p. 236). He argues that it is essential to understand narratives as part of change in order to identify how the purpose and values or "virtues" (ibid, p. 237) of the organisation are created and developed (MacIntyre, 1985; Conroy, 2010). Vaara, Sonenshein and Boje (2016) also state that "narratives provide an essential means for maintaining or reproducing stability and/or promoting or resisting change in and around organizations" (p. 496).

This is a social process and therefore, gathering and analysing these narratives is a way to understand how the organisation functions and thus, how change can be enacted in the organisation (ibid). Conroy (2010) states that if the narrative relating to the change is in conflict with the underlying narrative of the organisation, this could be a reason why change programmes fail. Pink (2011) echoes this finding saying that many business narratives about goals and objectives are not purpose led and thus lack the ability to get to the heart of the organisation and motivate employees to

action. Therefore, understanding organisation stories and using them effectively may hold the key to creating more successful and sustainable organisation change.

Brown, Gabriel and Gherardi (2009) argue that change and storytelling are closely related concepts as they both involve complex scenarios with multiple actors and situations. As identified earlier, a story has change at its heart, with the protagonist moving through a series of events towards a final resolution (Ibarra and Lineback, 2005). This link between change and story is explored further by Boje (1991a) who argues that "story performance and change are intertwined. Stories are created, old stories are remembered, some are revised, and stories about the future are performed in the collective dialogue among organisation stakeholders as they make sense of and even affect organisation change" (p. 9).

Whilst the significance of stories in change programmes has not been adequately explored in change literature (Bate, 2004) or as a management tool (Gabriel, 2004), there are signs that stories are becoming more accepted as a tool through which to understand an organisation, as per the earlier discussion regarding the narrative turn. A number of researchers suggest that there is a need for organisations to engage more deeply with storytelling as a means to improve the success of their change programmes (Collison and Mackenzie, 1999; McKee, 2003; Denning, 2004b; Gabriel, 2004; Langer and Thorup, 2006; Magala, 2011; Maas, 2012).

2.6.2 Studies of the use of stories in organisation change

As highlighted earlier in this literature review, stories are used in organisations for a variety of reasons, including sensemaking, learning, communication and identity forming (Rhodes and Brown, 2005). Stories are used for these reasons during periods of change as well, however there are a number of other areas that should be considered during change.

Stories play an important part in change by enabling individuals to identify their role in the change process, supporting the creation of a group identity amongst individual participants in the process and supporting the reframing that is required to move on from the present (Bate, 2004; Corley and Gioia, 2004; Ibarra and Lineback, 2005; Rhodes and Brown, 2005; Syedain, 2007; Sykes, Malik and West, 2013; Hay, Parker and Luksyte, 2020). A well told story about change can enable individuals to feel energised by the future of the organisation and vice versa (Boje and Baskin, 2011).

In the context of change, stories can be used to enable people to imagine the future, to build leadership trust and to build excitement and motivation (Denning, 2004b; Hatch, Kostera and Kozminski, 2005). Stories can also be used to reduce the level of resistance to change (Parkin, 2004) as they enable the presentation of information in a way that seems to mirror the way in which the human brain reflects reality (Ibarra and Lineback, 2005) and thus make it easier to understand and the audience more receptive (Butler, 2003; Denning, 2004a). Research conducted by the consulting firm McKinsey found that leaders who had a clear change story which was aligned with organisation values, and then communicated within the organisation, had a six times

more likely successful outcome of the change programme (Boudens, Palmer and Weddle, 2019).

Research has shown that whilst it is important to be able to clearly state how the organisation will look in the future, it is also important for leaders to be able to tell stories about the past of the organisation (Buchanan and Dawson, 2007; Vaara, Sonenshein and Boje, 2016). As previously discussed, this can be to both emphasise how things will change in the future but also to emphasise what is going to stay the same (Venus, Stam and van Knippenberg, 2018). Leaders can legitimise change by linking back to the past (McCarthy, 2008; Dailey and Browning, 2014; Maclean et al., 2014) and ensuring that employees understand that that there is a sense of continuity in the future.

According to Vaara, Sonenshein and Boje (2016), "actors compete to establish a dominant narrative about change, but these dominant narratives can alter the trajectory of the organisation in the future" (p. 517). So, the narratives told in organisations can shape how the organisation operates by determining understanding of the past and the future (Buchanan and Dawson, 2007; Vaara, Sonenshein and Boje, 2016). There are multiple narratives within any change event however which contribute to the overall messiness of change (Vaara, Sonenshein and Boje, 2016) and it is important to try and understand these multiple viewpoints.

Venus, Stam and van Knippenberg (2018) showed how important it is to:

ensure that new 'chapters' in the company's development make ideological sense with the old and top executives sustain a narrative while enabling its adaptation. In their role as custodians of the integrity of the company's historical narrative, they claim their legitimate right to direct it's ongoing saga (Venus, Stam and van Knippenberg, 2018, p. 544).

The authors argue that in order for employees to make sense of organisation change, stories should be used that create a sense of safety and stability, with clear links between past and present and a clear journey of change (ibid). This enables employees to make sense of the change through the use of narrative (Venus, Stam and van Knippenberg, 2018) and can be a factor in the success of a change programme (Adorisio, 2014).

The sensemaking role of stories has been examined in earlier sections but it is worth a further discussion here in relation to specific examples of change. Maitlis (2005) identified how this sensemaking role is particularly important during periods of change and periods of volatility and ambiguity (Brown and Humphreys, 2003; McCarthy, 2008; Abolafia, 2010; Hay, Parker and Luksyte, 2020). A key leadership role during periods of change is for leaders to tell stories that give sense to employees (Gioia and Chittipedi, 1991). However, in order for sensemaking to take place, stories must be told at the right time and in the right way (Maitlis and Lawrence, 2007).

Abolafia (2010) argues that organisations have a "repertoire of plots that it draws from in making sense of its environment" (p. 356). He describes these plots in

relation to policy making, however I argue that it is possible to apply this to strategy and change in organisations. In common with Boje's (1991a) concept of "terse storytelling" (p. 115), Abolafia (2010) suggests that people in organisations use shorthand, based on previous experiences, to make sense of new experiences. During these new experiences, sometimes existing stories may not fit and so will need to be updated to explain the new situation.

Other studies have also supported the role of stories during periods of change using stories that move away from traditional narrative structure, i.e. beginnings, middles and ends. Peirano-Vejo and Stablein (2009) explain that the almost continuous state of change that many organisations find themselves in creates the perfect conditions for using stories. The authors argue that

> stories often provide the vehicle for stability construction and maintenance because they are flexible carriers of meaning. Storytellers integrate elements of time, sequence, plot, character and motivation in diverse ways. Since thought is reconstructed in narrative terms, storytelling can reveal how people endure through stability and change (Peirano-Vejo and Stablein, 2009, p. 445).

Therefore, stories play an important role in sense making but the authors reject the notion that sensemaking in stories is a "mode of transition of one state to another" (ibid, p. 445). Citing Gioia and Chittipeddi's 1991 article, Peirano-Vejo and Stablein

(2009) critique the idea that a story told by a leader is what drives action by employees. Instead, they argue that sense making and sense giving are "recursive, reciprocal and interactive" (p. 445) activities and that change is an ongoing process rather than occurring in a series of episodes. Sense making and sense giving are activities undertaken by both the author of the story and its recipient.

In this way, researchers have reconsidered the role of the change agent from an individual who creates programmes to enable the change, to an individual who uses conversations and stories to enable people to reconstruct their own reality within the organisation (Ford, 1999; Maas, 2012). These realities will be individual to each person in the organisation and so the same event can be interpreted by different people in different ways (Rhodes and Price, 2011). Barry (1997) asserts that in order for change to be implemented in organisations, there must be an understanding of these story constructions at both the organisational and individual levels.

Boje and Baskin (2011) highlight that stories can increase disenchantment or dissatisfaction within an organisation. They contrast the typically encouraging top down stories from senior managers about change with the less positive bottom up stories that emerge within an organisation during a period of change, which may lead to conflict (Whittle, Mueller and Mangan, 2009; Boje and Baskin, 2011). Gabriel (2004) also considers these less formal, unofficial stories as being important as they are hard for management to control and can be in conflict with the official communications within the organisation, leading to resistance to change. Brown, Gabriel and Gherardi (2009) suggest that little focus has been placed on the ability of stories to block change, with most studies highlighting the role of the story in creating

action. In this study, the researchers highlight situations when stories were used to block change, for example by creating stories that focus on situations in the past when change did not work (ibid). In this way, stories can both move organisations forward but also lock organisations into their past (Rowlinson et al., 2014).

2.7   Conclusions and implications for this research

The existing research, as outlined in this literature review, has illustrated that a new approach to making sense of change in organisation is required, and that the use of story may provide a vehicle to do that. Therefore, in this research, I used storytelling as a both a method to gather information about how employees feel about the current change programme and as an output of the research process (Donnelly, Gabriel and Özkazanç-Pan, 2013).

Based on this literature review, there were a number of areas identified for further investigation through this research. Firstly, much of the existing research is focussed on the role of leaders using stories to assist employees in sense making activities during a change period (Maitlis, 2005). As it is the voices and stories of the most powerful players that are most often heard (Maitlis, 2005; Cassell and Symon, 2011; Maas, 2012), I gathered stories from leaders using interviews and from other organisational stakeholders using action research groups. This was to understand how these stakeholders' stories might be different and what this means for successful organisational change. The use of interviews and action research groups enabled both small stories (from individual employees about everyday work

interactions) and large stories (longer or bigger narratives such as organisation foundation stories or individual life histories) to be considered (Clifton, 2014; Mumby et al., 2017). Van Hulst and Ybema (2020) and Clifton (2014) highlight the need to undertake interviews but also to move beyond them to gather other observational data in order to find stories in situ. Interviews provide their own situation for storytelling and so it is important to also gather stories from everyday work as far as possible (ibid) in order to fully understand both the seen and unseen aspects of organisational life.

When identifying directions for future research in their 2007 paper, Maitlis and Lawrence identify the value that working with multiple stakeholders might give to organisations undergoing change. They suggest that "organization members might work to structure organizational change and strategy in ways that facilitate sense giving by both stakeholders and leaders and thus increase the potential influence of either of both groups." (ibid, p. 31). Whilst employee involvement is regularly highlighted as being important in successful change (Ford, 1999; Kotter and Cohen, 2002; Bryant, 2006; Andriopoulos and Dawson, 2009; Ace and Parker, 2010; Alfes, Truss and Gill, 2010; Burnes and Jackson, 2011; Miller, 2011; Boje, Bunes and Hassard, 2012) it is still not entirely clear from the existing research exactly how organisations should do this (Langer and Thorup, 2006).

Maitlis and Lawrence (2007) identify the opportunities that might arise if all stakeholders were able to work together and share their points of view during a change programme rather than change being a simply top down process. Boaz and Fox (2014) also identify the importance of identifying different mindsets at the start of

a change programme. They recommend a period of discovery, looking into individual mindsets and outward into organisation culture, and attempting to link them together in order to achieve organisational change success and reduce resistance to change (Boaz and Fox, 2014).

Boje (1991a) highlights the role of the consultant in gathering stories in changing organisations. He notes the importance of undertaking storytelling in groups to understand the stories that are being told and also recommends inviting participants into this process who are usually marginalised. My assumption underpinning this research is that, as Boje (1991a) has highlighted, storytelling is an important process of construction in organisations. Stories are a shared and collective part of the organisation and stories can also enable change (Boje, 2014).

This multiple narrative (Bryant, 2006) and multi agent approach (Brown, Gabriel and Gherardi, 2009) contrasts with many traditional change approaches which focus on managers/leaders communicating their own vision of the future to employees and then undertaking change programmes to encourage employees to fit into this reality (Langer and Thorup, 2006; Fronda and Moriceau, 2008; Boje and Baskin, 2011; Boje, Bunes and Hassard, 2012).   It seems that storytelling can enable employees to regain some of their power during a change programme (Brown, Gabriel and Gherardi, 2009), can be more open and inclusive, building on dialogue with employees to create long term lasting change (Langer and Thorup, 2006) and can illustrate the change journey in a way that is meaningful to employees (Pitsis, Simpson and Dehlin, 2012).

Many authors refer to the lack of focus on resistance to change in existing research and the lack of understanding about why resistance occurs (Hawkins, 2008; Bell, 2014; Harding, Ford and Lee, 2017; Mumby et al., 2017; Ybema and Horvers, 2017). The action research groups undertaken in this research may provide ideas for activities that could take place in organisations during a change programme, to facilitate conversations about resistance to change, mindsets and values. This involvement by all parties in the change could lead to more successful change programmes. As argued by Rafferty and Restuborg (2017), the history of change in the organisation and the impact that this has on employee views about change, is an under researched area in the change literature. Thus, by giving employees a space to air these views in the research, I was able to gain a greater understanding of the impact of change history. In addition, the approach of using action research groups provided an opportunity to review whether this might a useful approach for other change programmes. Rafferty and Restuborg (2017) highlight the need for open discussions between employees and change agents, as a means to show employees that they are valued but also to gain and learn from their views. The role of employee values in change was identified as being an area for additional research by Burnes and Jackson (2011) and again, this was an area of discussion in the action research groups.

Recent research by Beigi, Callahan and Michaelson (2019) and Dawson and Sykes (2019) has identified that not enough attention has been given to time and temporality in storytelling. There has been relatively little research on gathering stories over a period of time to determine how time is reflected in stories (ibid). My

research, conducted over a period of 3 years, enabled stories to be gathered over an extended period of time to assess how time is depicted in these stories. Dawson and Sykes (2019) have suggested that it is necessary to move beyond the conception that stories are either linear (Czarniawska, 1997; Gabriel, 2000; 2004) or non-linear (Boje, 2001; Boje, 2008). Instead, they argue that a more fluid use of time in stories is necessary to represent how stories are used in organisations (Dawson and Sykes, 2019).

Purser and Petranker (2004) identified that little consideration has been paid to the notion of time during periods of change. They argue that although change is often talked about as being constant, many organisations revert to change practices that are fixed in a linear motion, i.e. moving forwards through a series of steps (ibid). The authors argue that existing planned change processes do not equip organisations with the tools to deal with continuous or emergent change and suggest that a new approach is needed (ibid). Wolfram Cox (2001) argues that change in organisations is often represented in the literature in "dualistic, oppositional terms …with… distinctions made between change and stability" (p. 168). If an alternative view is taken, with change being more continuous and emergent, then new tools and approaches will be needed to support organisations. The extended timeframes for the research enabled the nature of change at UK Mutual to be observed over time, to determine how the change was perceived by employees.

As well as identifying problems in existing research to be investigated in this research, the literature review also enabled some areas of consideration in terms of

research design.   Whilst existing research is mostly positive about the impact that

stories might have on the success of organisation change programmes, there are

some limitations to their use. Despite significant increases in acceptance of stories

as organisation research, for some researchers, stories cannot be considered to be

rigorous enough to be classified as good research in their own right, without good

research design (Eisenhardt, 1991; Brown, Gabriel and Gherardi, 2009). Other

researchers suggest that stories are now being focused on at the expense of other

information such as timelines of events and chronologies in organisations (Gabriel

and Griffiths, 2011). Brown, Gabriel and Gherardi (2009) caution that although

stories can enable "vivid insights" (p. 326) into periods of organisation change, they

do not have a "monopoly on truth" (ibid).

Criticism has also been levelled at the lack of critical thinking in the field (Beigi,

Callahan and Michaelson, 2019) and the unwillingness by researchers to deeply

analyse or interrogate the stories that they gather (Brown, Gabriel and Gherardi,

2009; Salmon, 2010). Brown, Gabriel and Gherardi (2009) argue that this

unwillingness is due to the respect that is shown to storytellers lived experience by

the researchers and their respect of others' points of view. However, it is necessary

to remember that stories are inherently biased (Lawler, 2002) and so some critical

thinking is useful when working with stories gathered in organisations. Lawler (2002)

states that stories may not be remembered correctly by the storyteller or the

storyteller may change the story to represent how they want reality to be. But, she

also argues that it is impossible for people to access their past in an unbiased way as

it is "constantly worked and reworked to provide a coherent sense of the subject's

identity" (ibid, p. 249). As a researcher in organisation stories, this must be remembered throughout the research process.

Care must also be taken to ensure that the grand overarching narrative of the organisation doesn't dominate the research (Küpers, 2013). As Boje (1995) has identified, there are many stories that are told in organisations, not just one and thus it is important during the research process to "tell the voices and stories of those that are ostracized, marginalised or exploited" (Küpers, 2013, p. 507). These factors add to the messiness of story work in organisations (Gabriel, 2000; Donnelly, Gabriel and Özkazanç-Pan, 2013; Lambotte and Meunier, 2013) but for me, do not detract from the value of gathering stories in organisations to investigate how people perceive change.

Rosile et al (2013) provide a useful set of questions for the storytelling researcher to consider when structuring their research:

1. Methodology – how can the storytelling researcher find out from interviews etc what can be known?
2. Ontology – what can be known through storytelling?
3. Epistemology – what is the relationship between storytelling and the researcher's underlying assumptions about what constitutes knowledge?
4. Practice – how can the researcher change their practice as a result of the research?

(Adapted from Rosile et al, 2013, p. 560).

Based on a consideration of these factors, I developed a design for the research

which is outlined in the next chapter.

3 Methodology

"…research is a situated activity that locates the observer in the world. It consists of

a set of interpretative, material practices that make the world visible. … This means

that qualitative researchers study things in their natural settings, attempting to make

sense of, or interpret, phenomena in terms of the meanings that people bring to

them."

(Denzin and Lincoln, 2008, p.4)

3.1 Introduction

This chapter provides a description of the entire research process, from the

underlying philosophical approach to the methods used to gather and analyse data.

As already noted earlier in this thesis, the analysis process and outcomes are

presented in a separate chapter. This is to provide full details of the inductive and

interpretative analysis process that was undertaken, as suggested by the quote

above.

To structure this chapter, the research onion, developed by Saunders, Lewis and

Thornhill in 2009 has been used to illustrate how the research developed and how it

was underpinned throughout by a clear research philosophy. This model has been

chosen as it clearly illustrates the links between the various elements of a research

methodology and how they are layered one on top of the other to form a consistent

approach. There are many other models that illustrate the different elements of a research process, for example Denzin and Lincoln (2008) and the storytelling diamond developed by Rosile et al (2013) which was discussed in the Literature Review. However, I found the approach of Saunders, Lewis and Thornhill (2009) was most aligned to my own thinking about research methods as it provides a clear line of sight between all aspects of the research process.

This relationship between the various aspects of the research is summarised in the diagram below:

Fig 2:

Philosophy

Interpretivism

Approach

Strategy

Inductive

Method choices

Case study

Qualitative

Data collection

Analysis

- Interviews
- Action research groups
- Document analysis
- Reflective diary
- Appreciative inquiry
- Gioia analysis
- Visual analysis
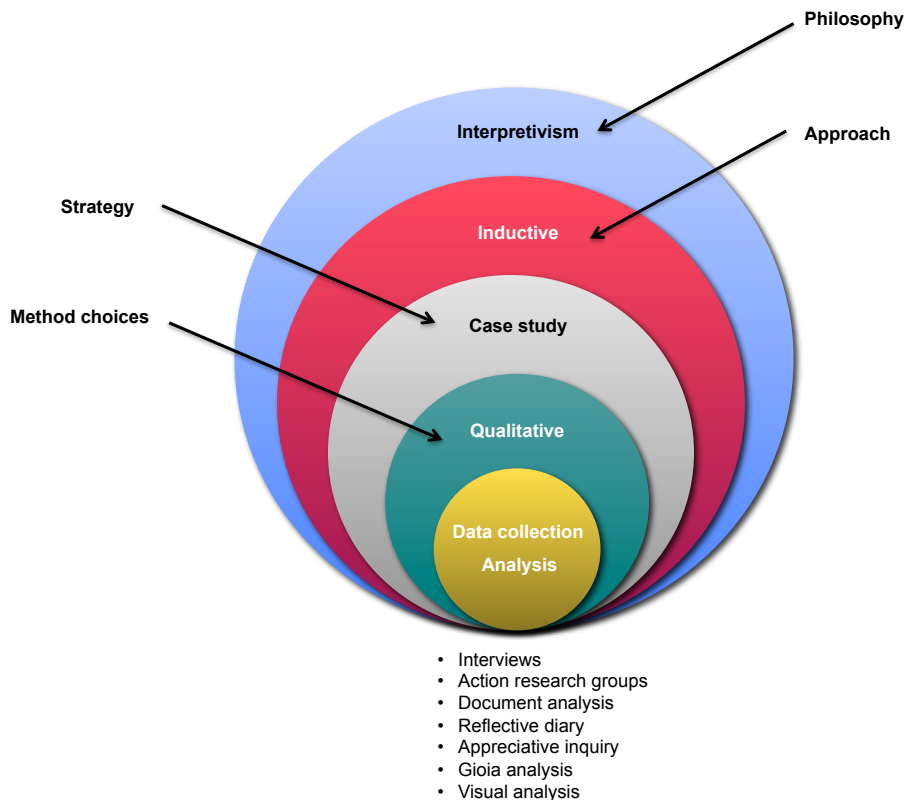
The research method onion, adapted from Saunders, Lewis and Thornhill (2009)

Each of these stages will be discussed in detail in this chapter, beginning with a review of the underlying research philosophy and approach. Then, the strategy used in the research, namely a case study will be discussed. Following this, the method choices and time frames for this research will be presented and discussed. In this research, a qualitative study over three years was used. Finally, the data collection and analysis methods will be considered. To conclude this chapter, a discussion of the methodological limitations of this research is presented before moving onto a detailed discussion of the analysis process in the next chapter.

3.2   Research philosophy and approach

Like all researchers, my approach to undertaking research has been shaped by my underlying assumptions and previous experiences (Denzin and Lincoln, 2008). I bring my consultancy custom and practice and associated assumptions about how to gain insight into the organisation into this piece of research. My initial ideas for my research were based on what was practical and pragmatic rather than deeper considerations about any philosophical perspective. Inevitably though, as I developed my research further and began the literature review, it was necessary to reflect on these assumptions in more detail in order to determine which approach would enable me to gain the best insights from my research. I found this very difficult given the unconscious nature of the assumptions which had driven my actions (Johnson and Duberley, 2000).

To explain the underlying philosophy of this research, this section is divided into three further sections. Firstly, the axiology or the role of my values in this research is discussed (Blaikie, 2007). Secondly, the ontology or nature of reality of this study is presented (Saunders, Lewis and Thornhill, 2009). Finally, the nature of the knowledge that will be gathered in this study (epistemology) is discussed.

3.2.1 Axiology

Denzin and Lincoln (2008) state that the life experiences of the researcher provide the initial structure and approach to the research before a researcher actually starts to consider theoretical paradigms and research methods. Key in shaping the researcher are their cultural background, any existing research traditions that they are aware of, their view of their role in relation to the research participants and their own ethics and political views (Denzin and Lincoln, 2008, p 30). Blaikie (2007) also highlights the role of the researcher's values in shaping their research approach, and that some research approaches are more influenced by the values of the researcher than others.

When I reflected on my own approach to research, it led me to realise that the following values were fundamental to me and had shaped my initial thinking about conducting research and undertaking a PhD:

- Qualitative research has value in its own right, although the outcomes will be different from quantitative research.

- Research conducted in a single organisation is of value, although it may not be applicable to other organisations.

- It is possible to find out about how an organisation operates by talking to people working in it and gathering their stories which will give an insight into how they view the world.

- The research will not generate causal relationships, rather theories and ideas will be developed. These will develop as the research progresses.

Saunders, Lewis and Thornhill (2009) emphasise the benefits of considering and critically evaluating these assumptions to determine if they are appropriate. This enables the researcher to make informed decisions about the design of their research (ibid).

These assumptions were not initially driven by a particular theoretical paradigm as, when I initially considered undertaking PhD research, I had no understanding of what these paradigms were. However, they influenced my choice of research methods and led me to undertake a piece of qualitative case study research in a single organisation. My use of interviews and action research was also influenced by the belief that obtaining the views of people within an organisation will enable understanding. And finally, the research was inductive and developed over time which links to the final assumption about causal relationships and theory building. Therefore, the assumptions were helpful in determining the approach to undertaking research and led me down a particular research path. However, given that I initially started the research with little knowledge about research paradigms, I did not have

the knowledge to challenge these assumptions and determine whether the assumptions of another research paradigm would be more helpful (Saunders, Lewis and Thornhill, 2009).

As the research continued beyond the initial planning stage, I began to engage more with theoretical paradigms and concluded that my own research philosophy sat within the interpretivist paradigm (Burrell and Morgan, 1982). This a common paradigm in story telling research, focussing on "individual's subjective recollections of events and experiences in psychological time" (Hay, Parker and Luksyte, 2016, p. 8). Blaikie (2007) asserts that interpretivist research is value laden in that the researcher and their values cannot be separated from the study being undertaken. They become an intrinsic part of it. Interpretivist studies also focus on understanding phenomena rather than explaining them. Looking back to when I began the research, I can see that my values and assumptions did indeed drive the research as Blaikie (2007) suggests for interpretivist research. This interpretivist stance led to my research being conducted as outlined below which provides more detail about the ontology and epistemology of interpretivist research.

3.2.2 Ontology

An interpretivist researcher understands that research with human subjects is different to other forms of research (Saunders, Lewis and Thornhill, 2009). Humans are social animals and interpret their own and others' actions based on the meanings

that they ascribe to these actions (ibid). This meaning is based on our own construction of reality which is influenced by our life experiences and cultural context.

The main focus of interpretivist research is try to and understand these meanings, in the cultural context of the phenomenon being studied (Hudson and Ozanne, 1988; Willis, Jost and Nilakanta, 2007). As a researcher though, we all have our own assumptions and beliefs that we use to understand behaviour. It is impossible to separate out the researcher's own reality from the reality that they are studying (Blaikie, 2007). This reality is socially constructed and subjective to each individual being studied (Saunders, Lewis and Thornhill, 2009).

There are those, particularly those researchers operating from a positivist paradigm, who criticise interpretivist research. Interpretivist research in organisations has been criticised as not providing enough objective data to enable managers to plan ahead and make predictions from the research (Uduma and Sylva, 2015). Grey (2013) suggests that this makes the outcome of such studies not useful to managers as they are not able to use the findings to achieve specific goals and objectives. In addition, because the research is so linked to the values of the researcher and results in descriptive data about the organisation, it makes it difficult to apply the learning from this research to other situations (Grey, 2013). However, many interpretivist researchers do not want their research to be replicated elsewhere. The purpose of their study is to explain a particular situation and provide a description of their understanding of it. This is the case for my research.

3.2.3 Epistemology

The knowledge that will be created by this research (epistemology) will attempt to derive meaning from individual actions and to understand individual realities (Saunders, Lewis and Thornhill, 2009). Such research is driven by the belief that individuals continually construct their reality based on what is happening in their lives (Smyth, 2006) and the stories that they tell about it (Burr, 1995; Kelm, 2008). Interpretivists consider that there is no single reality or truth that can be uncovered through the research (Willis, Jost and Nilakanta, 2007). Instead, the researcher seeks to describe their understanding or 'verstehen' of a particular context (Hudson and Ozanne, 1988; Johnson et al., 2006; Willis, Jost and Nilakanta, 2007). This 'verstehen' is an understanding of the shared meaning of the phenomenon (Hudson and Ozanne, 1988). An understanding is not an end point though. It is a process whereby over a period of time, the researcher will come to an understanding at different points in the research. These may change as the research continues (Hudson and Ozanne, 1988).

This was definitely true for my own research, where the outcomes of the interviews led to the identification of a number of themes. These themes reflected my understanding of the organisation and the phenomena being studied at that time. Then, these themes were used to shape the structure and content of the action research groups and at the end of each group session, another different set of themes emerged. These themes then influenced the questions that I asked in the next group and so on. Therefore, at different points in the research, my understanding of the organisation was different (Hudson and Ozanne, 1988) until

ultimately the understanding upon which this thesis is based emerged from the analysis. The analysis also followed this process, with NVivo being used to identify themes to create the initial understanding and then the Gioia Methodology (Gioia, Corley and Hamilton, 2013) to build key themes. There is more detail on the analysis approach in chapter 4.

3.3   Research strategy and methods

Saunders, Lewis and Thornhill (2009) describe a research strategy as the plan that a researcher takes in order answer their research questions. Typically, these strategies could include experiments, surveys, case studies, action research and ethnography amongst others. For this research, I decided to conduct research in a single organisation (a case study). Also included in Saunders, Lewis and Thornhill (2009) model are the choices of methods and timeframe that a researcher makes. I made use of purely qualitative methods for this study and conducted the research over a three year timescale.

The purpose of this choice was to ensure that I was able to gather rich data over a long time period to determine if participant's views changed over time. Using Denzin and Lincoln's (2011) metaphor of the researcher as bricoleur as a model, I wanted to use multiple methods of collection to gather data together and then make sense of it through the analysis process. These choices of research strategies and methods are discussed in more detail in the paragraphs below.

3.3.1 Case study research

The strategy that I had determined to use was a case study in a single organisation. This was partly driven by my own assumption that this would be a valuable piece of research but also due to practicality (Punch, 2005). I had an existing relationship with the organisation in question, so had a priori knowledge of the organisation (Hudson and Ozanne, 1988), and they were interested in the research that I was proposing (Bryman and Bell, 2011; Silverman, 2013; Baškarada, 2014; Yin, 2014). I knew that I would be able to use this existing knowledge to undertake an in depth study of UK Mutual over a period of time.

My purpose in undertaking this form of research is summarised by Punch (2005):

> The basic idea is that one case (or perhaps a small number of cases) will be studied in detail, using whatever methods seem appropriate. While there may be a variety of specific purposes and research questions, the general objective is to develop as full an understanding of that case as possible (Punch, 2005, p.150).

Case study research typically investigates phenomena in detail using a variety of data gathering methods such as interviews, questionnaires, group discussions and document analysis and both qualitative and quantitative analysis methods as appropriate (Darke, Shanks and Broadbent, 1998). Case study research can be used to both to test theory and to generate theory (Yin, 2014) by taking different approaches to the conduct and planning of the research based on the objectives of

the study and the theoretical stance of the researcher (Darke, Shanks and Broadbent, 1998).

For this research, a case study seemed an appropriate means by which to describe an organisation (Hudson and Ozanne, 1988; Saunders, Lewis and Thornhill, 2009) going through significant change as it enabled me to study the organisation in depth over a period of time (Baškarada, 2014). The organisation is an interesting one to study due to its relatively unique history and structure and also having experienced very little organisational change in the past. This study provided an ideal opportunity to investigate a critical moment in the organisation history (Darke, Shanks and Broadbent, 1998; Yin, 2014).

Within the field of storytelling research, case studies are a well used research approach and given the richness of data that can be gathered (Steenhuis and Bruijn, 2006), are deservedly popular. Many researchers use case studies to build a longer term relationship with individuals in an organisation and gather deep and rich data. This data can be used to help researchers to understand how day to day life within the organisation is constructed (McCarthy, 2008; Rosile et al., 2013; Silverman, 2013).

There are number of different approaches to conducting case studies, most notably developed by Eisenhardt (1989) and Yin (2014). My research was most influenced by Eisenhardt's (1989) approach as this fitted best with the theoretical paradigm of this research. Yin's (2014) approach is prescriptive whereby theories are developed prior

to the research and then tested through the case study (Steenhuis and Bruijn, 2006).

Eisenhardt (1989) suggests a new approach which is a bridge between the

Grounded Theory approach (Glaser and Strauss, 1967) whereby the researcher

constantly moves between gathering data and analysing the data to create concepts

and themes which then lead to theory (Steenhuis and Bruijn, 2006), and Yin's

approach. Eisenhardt (1989) takes a middle ground and proposes a planned and

structured approach (Darke, Shanks and Broadbent, 1998) to conducting the

research. She suggests selecting the case study early in the research process

(Steenhuis and Bruijn, 2006) whilst also allowing theories to be cyclically reflected

upon (Bassot, 2013) throughout the research rather than at the start (Eisenhardt,

1989; Eisenhardt and Graebner, 2007). In my research, I selected the organisation

which I was going to use as a case study in the very early stages of the research

development. The development of themes, ideas and theories emerging from the

research was a cyclical process and these themes changed throughout the research

period.

3.3.2 Qualitative research

Qualitative research is defined by Spencer et al (2003) as:

> "… provid[ing] an in-depth understanding of people's experiences,
>
> perspectives and histories in the context of their personal circumstances or
>
> settings. Among many distinctive features, it is characterised by a concern
>
> with exploring phenomena from the perspective of those being studied; with

the use of unstructured methods which are sensitive to the social context of

the study … (Spencer et al, 2003. p. 14)

Silverman (2013) argues that qualitative research is often a preferred option for many

researchers based on their previous experiences and what they enjoy doing. This

was certainly true for me. Qualitative research would also provide the opportunity to

generate rich, narrative data (Spencer et al., 2003; Silverman, 2013). In addition, this

piece of research was designed to be descriptive, providing information on what was

happening within a specific organisation (Ercikan and Roth, 2006) rather than

explanation.

Qualitative research has been consistently gaining ground as an important method of

research in organisations in recent years (Tracy, 2010), with a wide variety of

methods and strategies being available to qualitative researchers. This variety

though does present a challenge to researchers. As Tracy (2010) argues, the variety

means that there is a lack of consensus within the qualitative field about what 'good'

qualitative research looks like. She contrasts the accepted criteria of validity,

reliability, generalisability and objectivity that can be used to measure the success of

quantitative research with the "cornucopia of distinct concepts" (ibid, p. 837) available

to qualitative researchers. For example, in recent years, a number of criteria based

approaches to evaluating qualitative research have been developed to replace these

accepted criteria (Morse et al., 2002; Spencer et al., 2003; Johnson et al., 2006;

Heikkinen et al., 2012). This variety means that there are fewer agreed concepts that

can be used by qualitative researchers to communicate the value of qualitative

research to non-qualitative researchers, particularly those working from a positivist paradigm.

For positivist researchers, it can be difficult to accept that qualitative research is valid because it does not conform with the accepted notions of validity, generalisability and reliability and some researchers believe that this accounts for the lack of visibility of qualitative research in journals (Cassell et al., 2006; Johnson et al., 2006). Cassell et al (2006) highlight how important it is for journals to publish research that is backed up by data, otherwise it is seen as just "an interesting story" (p. 296). And this is the key tension between positivist and interpretivist researchers: it is these very stories that interpretivist researchers are interested in.

For interpretivist researchers, terms such as validity, reliability and generalisability are less relevant in evaluating research as they would be for positivists (Baškarada, 2014; Thomas, 2016). Interpretivist research is by its nature difficult to replicate in other organisations and does not lead to causal relationships (Willis, Jost and Nilakanta, 2007). It is not necessary to design this form of research in a way that enables it to be repeated again (Darke, Shanks and Broadbent, 1998; Steenhuis and Bruijn, 2006) and so an alternative evaluation approach is required.   This approach should be contingent on the philosophical underpinnings of the research being undertaken, rather than being applied to all research (Johnson et al., 2006).

Willis, Jost and Nilakanta (2007) suggest using three criteria as a way to judge how successful a piece of research is – coherence, consensus and instrumental utility.

Firstly, coherence refers to whether the research makes sense holistically and is persuasive. Secondly, consensus refers to the consistency of the research with other research in the same field. Finally, instrumental utility means whether the research is useful. Willis, Jost and Nilakanta (2007) argue that these criteria are most relevant to interpretivist researchers, although for my own research I wanted to find a framework that was more extensive and had been used in similar research situations.

Tracy (2010) has developed a framework which she suggests can be used to illustrate the value of all qualitative research to others. This framework is not without controversy. Some qualitative researchers feel that such research should be free of the constraints of quantitative research and therefore it is not helpful to create structures around it (Denzin and Lincoln, 2008; Tracy, 2010). As a novice researcher however, I referred to this framework as it enabled me to think about the key aspects of qualitative research that I wanted to feature in my methodology. Tracy (2010) posits that there are 8 key criteria that are required for a piece of qualitative research to be excellent. These are:

- Worthy - having a research topic that is timely and interesting;
- Rich rigour - being rigorous in the use of theories, data, time spent data gathering, samples and analysis processes;
- Sincerity - considering the impact of researcher values and biases and being honest about the challenges of the research;

- Credibility – providing detailed descriptions and details and multiple voices in the research;

- Resonance – influencing the reader through ways of writing and useful outcomes;

- Contribution – providing a meaningful contribution to the field;

- Ethical – considering all aspects of the ethics of the research;

- Meaningful coherence – achieving the planned outcomes of the study, using appropriate methods and approaches.

Adapted from Tracy (2010)

The contents of this chapter illustrate how my research was influenced and links to these criteria, in my efforts to create an excellent piece of research. For example, the use of the Saunders, Lewis and Thornhill (2009) framework as a means to ensure the coherence of the research with a clear thread leading from research design to execution. This chapter also contains extensive discussions about the ethical issues arising from the research and also reflections about how the research could have been improved, see section 3.5.

3.4 Data collection and analysis methods

In order to gather data relating to my research question, I used a combination of methods: semi structured interviews, action research groups and a desktop review of

documents and other organisation texts and artefacts (Gabriel, 2000) relating to the change programmes in the organisation.

The intention at the start of the research process was to ensure active participation through the use of interviews and action research groups. I wanted to get as close as possible to understanding the perspective of the participants through detailed interactions with them in a natural setting (Hudson and Ozanne, 1988; Denzin and Lincoln, 2008). The aim was to use these groups to enable development and learning for the participants, time for reflection (Schön, 1991; Greenwood and Levin, 1998; Reason and Bradbury, 2006; Bryman and Bell, 2011; McNiff and Whitehead, 2011) and to ensure that rich, descriptive data could be gathered. Interpretive research inevitably includes participation from the researcher in the research and a more co-operative research process whereby the researcher and the participants work together to achieve understanding (Hudson and Ozanne, 1988; Willis, Jost and Nilakanta, 2007)

In reality, whilst the interviews and groups were participative in that they were used to gather the views of the individuals and they had some control over the direction of the discussions (Rahman, 1993; Kindon, Pain and Kesby, 2007), ultimately the overall control of the issues discussed in the groups and interviews resided with me, the researcher. As Tripp (1998) identifies, there are different forms of participation and in this case, there was functional participation (the groups met to discuss issues and had some input but ultimately did not fully direct the research) but not full participation in a participatory action research sense (Tripp, 1998). For this to be the

case, the participants needed a greater degree of autonomy and ownership of the research.

Nevertheless, the principles of action research certainly lay behind the structure of the research and the level of involvement by participants was useful to ensure that the research outputs were relevant (Brydon-Miller, Greenwood and Maquire, 2003). This was important as I was keen that the research process would be a stimulating process for the participants and for the organisation (Greenwood and Levin, 1998; Altrichter et al., 2002; Reason and Bradbury, 2006; Saunders, Lewis and Thornhill, 2009; Bryman and Bell, 2011).

Following a period of planning for the research and initial discussions with organisation stakeholders, the data gathering activity commenced in June 2014 with the semi structured interviews and continued until December 2016 when the final meeting with the action research group was completed. On average, I spent two days per week in the organisation during this period, undertaking a mixture of research and paid consultancy work including half a day per week undertaking data gathering activities. The duration of each of the interviews and action research groups is detailed later in this chapter.

Following completion of the data gathering activity, a review of documents, texts and other organisational artefacts was used to add context and to the findings from the interviews and action research groups (Gabriel and Griffiths, 2011). In particular, two internally published books which outline the history of the organisation were found and discussed.   I was also given access to some documents and sources from the

organisation intranet during my interviews with key stakeholders as they tried to provide me with more context for their stories (Adorisio, 2014; Bliesemann de Guevara, 2014; Maclean et al., 2014; Ybema, 2014).

Finally, a key part of this research has been reflection on my own practice as a consultant and advisor (Schön, 1991; Cassell and Symon, 2011; Bassot, 2013). Throughout, I made notes about my experiences to ensure that I was also a full participant in the research journey (Gozzoli and Frascaroli, 2012). This took the form of a number of notebooks in which I noted my thoughts and reflections throughout the research process. I made notes as I went along and when I felt that I had something to write rather than in a scheduled way (Empson, 2013). I found this experience to be very valuable as it enabled me to step back from the research and reflect about what my experiences meant, how they would change my own practices and what I needed to do next (Coghlan, 2007).

The analysis of the outcomes of the interviews and the action research groups was conducted firstly using NVivo to support a thematic analysis of the whole of the data (Ritchie, Spencer and O'Connor, 2003) and then secondly using the Gioia Methodology (Gioia, Corley and Hamilton, 2013) to work with the data using these themes (Clark et al., 2010). Following the thematic analysis, a more detailed analysis of a selection of stories was undertaken in order to more fully explore and interpret their meaning (Gabriel, 2018a). These stories were chosen to best reflect the themes identified in the thematic analysis. In this way, a hermeneutic circle was used to shape the analysis, moving from the whole data, to individual parts and then

back to the whole again, in order to interpret the data and create conclusions (Gabriel, 2018a).

A visual analysis was also undertaken of a number of photographs and drawings which were gathered during the action research groups. Visual data is increasingly being used in research as a means to enhance the knowledge that can be gained from other research methods (Prosser and Loxley, 2008) and it is seen by many researchers as a continuation of the narrative turn in research, moving from words to images (Grady, 2008; Jenkings, Woodward and Winter, 2008; Bell and Davison, 2013). Visual data can include many different types of content (Silverman, 2013), from physical objects such as photographs and signs to the body language of the participants.

In this research, the visual data gathered were photographs from the participants and drawings. The purpose of generating this visual data was to stimulate further discussions on the themes emerging from the action research groups (Silverman, 2013). In addition, as Silverman (2013) highlights, asking participants to self select images removes any influence or constraint on content by the researcher (Mannay, 2014). It enables the participants to set the agenda and present their thoughts in a different way, using their own voice and style (Jenkings, Woodward and Winter, 2008; Cremin, Mason and Busher, 2011; Thomas, 2016). This can be very useful when the researcher has insider knowledge of the organisation as getting participants to do things in different ways creates new ways of thinking and fights familiarity (Mannay, 2014). Using drawings in particular can also create very different

responses from a conversation or group discussion, perhaps pushing participants out of their day to day comfort zone and encouraging them to look at things differently (Prosser and Loxley, 2008).

3.4.1 Exploratory study - Semi structured interviews

3.4.1.1 Purpose

The initial phase of research was to conduct an exploratory study using semi structured interviews to enable an understanding of the organisation context and the areas to be investigated. In addition, the outcomes of the interviews were used to inform the approach taken to the initial action research group and then subsequently were used to add context to the more in depth individual stories and themes from the action research groups.

Semi structured interviews were carried out to collect stories about individual experiences of change in the organisation. Individuals were selected to take part in the interviews based upon their current level of interest and knowledge about organisation change (Knapik, 2006). These individuals were selected for me by two senior organisational stakeholders following detailed discussion about my research questions and the area of focus for the research. The sampling methods used are discussed and critiqued further in section 3.4.1.3.

I wanted to use the interviews to gather stories about specific change incidences and investigate the key themes covered by the stories (Gabriel, 2000; 2004; Gabriel and Griffiths, 2011). I also wanted to use the outputs of the interviews to determine if

there were differences between those stories of change told in the interviews and those told in the action research groups.

I decided to use face to face interviews in my research as although they are time consuming to undertake, transcribe and analyse, I felt that this would be worthwhile given the richness of data that I would be able to gather in contrast to a questionnaire (McCracken, 1988; Gillham, 2000). The interviews would enable the discovery of detailed information about how the participants experienced UK Mutual and their role within it (Lawler, 2002). Lawler (2002) highlights how very detailed stories can emerge from interviews, if participants have the time and space to create them. Also, given the relative small participant sample and the fact that most participants were based at a single geographic location, I felt that the time taken to do the interviews would be minimised (Gillham, 2000). Rather than be completely unstructured, I felt that a semi structured interview would enable me to efficiently (McCracken, 1988) obtain information whilst still giving me the flexibility to depart from the interview schedule to explore interesting discussion areas if required (McCracken, 1988; Gillham, 2000; Legard, Keegan and Ward, 2003).

The interview was designed using open questions to elicit stories (Lawler, 2002; Riessman, 2008) with the greatest level of detail and information from the participant alongside accompanying probing questions, both planned and floating (McCracken, 1988), to obtain more information if participants required additional encouragement (McCracken, 1988; Gillham, 2000). My aim was to allow the participant as much time as they needed to tell their story whilst still managing the interview to allow it to run as effectively as possible (McCracken, 1988).

As Knapik (2006) describes, I also did not want the interview to feel like a one sided encounter where I asked the questions and the participant felt that they had information "sucked" out of them (p. 86.). Knapik (2006) and Brinkmann and Kvale (2005) describe an alternative approach as an interactional style of interview, with interviewer and interviewee participating in mutual exploration of the topic. This style appealed as I felt it would enable me to build rapport with the participant and quickly build a relationship whereby they felt comfortable telling me detailed stories (Brinkmann and Kvale, 2005; Knapik, 2006). I did not want to undertake "tourist interviews" (Kvale and Brinkmann, 2009, p 299), where I met with the participants very briefly and was unable to gather anything more than a snapshot of information from them.

Mindful of this, I tried to focus on the craft of interviewing, ensuring that I would pay attention to body language (both mine and the participant's) and my reactions to their responses (Knapik, 2006; Kvale and Brinkmann, 2009). To remind myself of this, I made a prompt sheet for myself for each interview, prompting me to be aware of my own reactions when listening to the participant's stories. As Czarniawska (2004) states, the interviewee is the expert in their job and my job as interviewer was to maintain attention and interest.

3.4.1.2 Piloting process

The questions for the semi structured interviews were piloted twice, once to test that the questions generated the appropriate information and then, after I found that the first set of questions did not get the detailed answers that I was looking for, I undertook a second pilot. I wanted to gather detailed stories from the participants

about their experiences of change in the organisation in the past and present however the pilot questions led to short responses without the required level of detail. They felt awkward and forced and so I made significant changes to the questions and accompanying probes (Gillham, 2000) following the first pilot.

I found the whole process both challenging and humbling, as having spent many years as a consultant, I had thought that I was skilled in asking the right questions (Gillham, 2000; Hollway and Jefferson, 2000). I clearly had a lot to learn about research interviewing and how to develop my craft in this area (Kvale and Brinkmann, 2009). This was a frustrating period of the research. In the words of Clancy and Vine (2019), I asked myself:

> how is it possible at this stage in my life to feel so stupid? I never realised that this would be such a painful process … moving from some semblance of competence in the 'real' world to this feeling of utter incompetence in this new world of research (Clancy and Vine, 2019, p. 212).

I took a lot of comfort in Czarniawska's (2004) words also: "clever interviewers who never make mistakes reduce their interlocuters to puppets reciting what the researcher has previously thought up" (p. 53).

To improve my practice and following the advice of Kvale and Brinkmann (2009), I conducted a second round of pilot interviews and this time I recorded them and listened back to the recordings, reflecting on what I noticed. This was a useful

process and by the time the real interviews took place, I felt a lot more confident. I

planned to record the interviews on a digital recording device and so I also tested

these during the pilot process to ensure that it worked effectively.

3.4.1.3 Participant selection

Based on the pilots, I concluded that the interviews would last for around an hour to

an hour and a half. I planned to undertake 10 individual interviews to obtain as broad

a spread of views as possible whilst still having time to undertake quality and in depth

interviews with all participants (McCracken, 1988). I planned for all the interviews to

be face to face, unless a participant was unable to meet me due to work

commitments or location. Given the level of seniority of the potential participants, I

had concerns that it might be difficult to get time in their diaries to enable the full

interviews to be completed (McCracken, 1988). These individuals had extremely

busy diaries and I thought it was likely to be difficult to find a slot in their diaries in

between their many meetings and commitments. In reality, it was relatively easy to

get their commitment to come to the interview, working with their secretaries to find

an appropriate time because I was willing to fit in with their diaries as required.

Gabriel (2000) highlights the difficulties of obtaining consent to gather stories in

organisational research, as some senior leaders may feel that telling stories is not a

good use of their time. He recommends focussing on other aspects of the research,

for example using the stories to gather information about organisational change, as

this is likely to be of more interest (ibid). In the materials that I developed to send out

to potential participants, I ensured that I talked about how the research was to gather

views about organisation change in UK Mutual with the aim of improving practice.

Stories were not mentioned specifically (Driver, 2009) and this may be why I was successful in gaining access to very senior individuals within UK Mutual.

Potential participants for the interviews were selected for me by senior organisational stakeholders within the Learning and Development department and were individuals who would have an understanding of the topic under discussion and would be most able to inform the research (McCracken, 1988; Corley and Gioia, 2004). Corley and Gioia (2004) refer to this as purposeful sampling. Each potential participant was contacted by the Learning and Development stakeholders via email explaining the purpose of the research to enable them to put the interview into context (Gabriel, 2018a). This invitation was written by me but sent out from the organisational stakeholders. If this invitation was accepted, face to face interviews were then scheduled by me either via email or on the telephone, at their place of work.

Following this initial contact with potential participants, I had 8 interviewees with another 2 people being suggested by the participants. I decided not to contact these people initially, waiting until the initial 8 interviews were complete before deciding whether to undertake more if required. Participants were required to complete a consent form and provide basic demographic data including age, length of service and previous experience in the financial services sector before joining UK Mutual.

This data is collated overleaf in a data table:

Table 2:

Participant	Gender	Length of service	Previous experience in sector?	Age	Highest educational attainment	Professional qualifications	Interview duration
1	Male	4.5 years	Yes	31 – 40 years	Degree	Yes	52 minutes
2	Female	4 years	Yes	41 – 50 years	Postgraduate	Yes	45 minutes
3	Male	6.5 years	No	51 – 60 years	Postgraduate	Yes	67 minutes
4	Female	2 years	Yes	51 – 60 years	Degree	Yes	59 minutes
5	Female	3 years	Yes	51 – 60 years	Degree	Yes	42 minutes
6	Male	10 years	Yes	41 – 50 years	Degree	Yes	40 minutes
7	Male	10 years	Yes	51 - 60 years	Degree	Yes	72 minutes
8	Male	20 years	Yes	41 – 50 years	Postgraduate	Yes	75 minutes

Data table, interview participants

There is a range of length of service at UK Mutual and also a varied age range between 31 and 60 years of age. What is most striking are the high levels of educational attainment and professional qualifications in this group. All of the participants have professional qualifications and all are at least degree qualified. Three of the participants had completed postgraduate qualifications, with two of them having completed a Masters degree and one of them, Participant 8, having completed a PhD. As an organisation, UK Mutual is very committed to learning, requiring participants to undertake additional study and professional qualifications before becoming a manager. So, the level of achievement in this senior management group is reflective of this. Also interesting to note is the high level of experience within the sector (but outside of UK Mutual) within this group. This enables these participants to reflect upon how UK Mutual compares with their previous experiences in the sector.

The interviews all took place during the Summer and Autumn of 2014. After completing the eight initial interviews, I found that there was such a strong level of agreement of responses between the interviewees that when I had completed 8 interviews, I decided to stop as I felt that I would not gain further benefit from arranging more interviews and that saturation point had been reached (Gabriel, 2000). This high level of consistency between the participant's stories gave me confidence that I could use the outcomes of the interviews to shape the further direction of the research.

Despite the small sample size, I felt that the depth of data that was gathered from the interviews and the themes that I was subsequently able to identify were sufficient to enable me to plan for the action research groups (Gillham, 2000; Ritchie, Spencer and O'Connor, 2003; Sintonen and Auvinen, 2009). Reflecting on this now, at the end of the research, it would have been really interesting to go back to the interviewees again at different points in the research, as I did with the action research group. This would have enabled me to see whether their views had changed throughout the period of research (Gobo, 2008) and also would mean that I could have built a stronger relationship with them. Despite my best efforts, having only met with them to interview them, there is a danger that I was a tourist interviewer rather than truly travelling with them along the research journey (Kvale and Brinkmann, 2009). However, despite this, the purpose of the interviews was to provide the initial discussion points for the action research groups and they provided me with enough information for me to do this.

3.4.1.4 Conducting the interview

A copy of the final interview script is contained in Appendix 1. The questions are a mix of initial questions to get the discussion moving, prompts and open grand tour questions that were inspired by other researchers work in the area of storytelling and suggested good practice in conducting qualitative interviews (McCracken, 1988; Gabriel, 2000; Legard, Keegan and Ward, 2003; Knapik, 2006; Sintonen and Auvinen, 2009; Watkins, Mohr and Kelly, 2011).

As per the interview script, at the start of each interview, I recapped the purpose of the interview and the key aspects of the consent form to ensure that the participant was happy with how the interview would proceed. This part of the interview was scripted to ensure that each participant received the same information. I then ensured that the first question was an easy one to answer so that the participant could feel at ease and get into the flow of the discussion before moving onto the more open, grand tour questions (McCracken, 1988). Each interview followed the same structure, with all the questions in the template being asked along with any supplementary prompt questions that occurred during the discussion. At the end of the interview, I returned again to the script to inform the participant about next steps and return the interviewee to the real world again (Legard, Keegan and Ward, 2003).

Initially, I had some concerns about whether participants would be totally open and honest during the interview, that perhaps they would try to answer as they thought I wanted them to (Knapik, 2006; Gabriel, 2018a). Or, that they might be trying to tell me stories that fitted with their own self image (Knapik, 2006). This bias is often referred to as a potential issue for story based researchers (Lawler, 2002). However, Gabriel (2000) and Lawler (2002) both argue that there is always bias when gathering data from individuals as people reuse and redevelop stories from the past on a constant basis. Gabriel (2000) argues that stories gathered in research should not be regarded as being factual accounts. He maintains that all stories are based on the participant's interpretations of the situation and how they wish to tell the story at the time of the interview (ibid). Even if these are not factually accurate, they will still have meaning for the individual and it is this that the researcher must tease out

from the data (Gabriel, 2017). Nonetheless, it was important for me to be aware of actual events that have taken place in the organisation, to understand the context. This is where the document review was helpful to enable a picture to be built up of the change activities that were taking place in the UK Mutual at the time of the research.

I also initially had concerns, based on my experiences during the piloting phase, that the participants would not open up to me and the interviews would be very stilted. Whilst I hoped that I would be able to build up enough trust with the participant for this not to be the case (Gillham, 2000) this was still a worry when I conducted the first interview. Actually, I found that it was not difficult to get participants to open up and that all participants were very happy to be interviewed for the proposed amount of time. This is because I had spent a significant amount of time with each participant preparing them for the interview, discussing my research and how the interviews would be conducted. Also, the organisational stakeholders who assisted me in setting up the interviews had similar discussions behind the scenes. So, by the time the interview was conducted, the participants were familiar with and comfortable with the way the interview would take place.

3.4.1.5 Transcription and initial theme identification

The interviews were digitally recorded, with some notes made by me to record other aspects of the interview such as body language and points of emphasis, as well as to assist with the transcription of the interviews (Gabriel, 2000). However, these notes were not extensive and were usually made immediately after the interview to ensure

that I could focus on what the participant was saying (McCracken, 1988) and fully engage in the interview conversation, travelling with them through the interview as in the interview as traveller metaphor (Legard, Keegan and Ward, 2003). The recordings made during the semi structured interviews were transcribed verbatim by an external party, reviewed by me and then sent back to the participants for review and agreement. The transcriptions had all names, job roles, departments and other identifying information removed and following approval from the participant, the original digital recording was deleted (Bryman and Bell, 2011). From this point onwards, each interviewee was identified by a number only to ensure anonymity and also to reassure participants that they could be completely honest in their interview (Gillham, 2000). Only one participant wished to make minor changes to their transcript to clarify some abbreviations that had been used and transcribed incorrectly and these were completed and approved by the participant before the original digital recording was deleted. This participant had completed a PhD themselves and so perhaps was more thorough in their review of the transcript and more critical of the content of the transcription. The participant was also, by their own admission, a stickler for detail.

The transcripts were coded using NVivo and this coding was then used to identify key themes and areas for future study (McCracken, 1988; Gabriel, 2000; Boje, 2001; Gabriel, 2004; Gabriel and Griffiths, 2011; Gozzoli and Frascaroli, 2012). Based on this analysis and sorting of data, a number of consistent themes emerged from these interviews. Further information about the analysis process and the key themes emerging from this analysis are in chapter 4.

After completion of all the interviews, the identified themes were discussed at a meeting with the key stakeholders within the organisation who assisted me with the logistics and planning aspects of the research to discuss how they would be used with the action research group (McNiff and Whitehead, 2011). It was also useful at this stage to get the view of these stakeholders on the relevance of these themes. They agreed that they were very relevant and so following this meeting, the next stage was to conduct the action research groups.

3.4.2 Action Research Group

3.4.2.1 Purpose

Action research is a form of research where the researcher participates in the research and seeks to gather insights using the expertise of the participants (Fortune et al., 2015). In contrast with some other forms of research, in action research the researcher is not providing expert knowledge but works with the participants to create ideas and build theory (Fortune et al., 2015). Action research also focuses on creating change in organisations and learning opportunities for participants (Coghlan and Brannick, 2014). Coghlan and Brannick (2014) argue that action research can be characterised as being a collaborative partnership between researcher and participants and focussing on problem solving. Research using this approach should be about creating real life solutions to organisation circumstances.

In this research, action research groups were used to create an arena for further investigation of the stories identified through the interviews (Brown, Gabriel and

Gherardi, 2009; Gozzoli and Frascaroli, 2012) and also to enable stories to be gathered in a more natural context than an interview (Gabriel, 2000; Boje, 2001; Boje, 2008; Whittle, Mueller and Mangan, 2009). The first meeting was in June 2015 and the meetings continued until December 2016.

I decided to use action research groups so that I could collaborate and participate in the research with the participants (Brydon-Miller, Greenwood and Maquire, 2003; Blichfeldt and Andersen, 2006; Heikkinen et al., 2012; Chevalier and Buckles, 2013). I hoped that this would lead to greater insights for the research as well as potential sharing of knowledge with the organisation during a period of change (Gozzoli and Frascaroli, 2012; Kajamaa, 2012). In addition, I felt that the groups would create an environment where the stories gathered during the interviews could be collectively shared and discussed, in order to create a deeper level of understanding (Driver, 2009).

Fortune et al (2015) highlight how useful action research groups can be in researching organisation change as they enable people impacted by the change to participate. Often, organisation change is a top down process and using action research groups enables a wider selection of the organisation to participate in considering ways to create change (Fortune et al., 2015).

3.4.2.2 Designing the action research group – appreciative inquiry

The principles of appreciative inquiry underpinned the design of the action research group as my intention was to create a shared experience to ensure that the stories of

all participants could be heard (Watkins, Mohr and Kelly, 2011; Chevalier and Buckles, 2013). Watkins, Mohr and Kelly (2011) suggest that the appreciative inquiry approach enables participants to take a more positive approach to change and for groups to "dream together" about the future (p. 52). For this reason, as well as the existing use of appreciative inquiry in learning at UK Mutual (Bushe, 2011), I decided to use appreciative inquiry in the action research groups.

Appreciative inquiry focuses on identifying solutions and positive outcomes rather than simply highlighting problems (Fortune et al., 2015). I felt that taking this approach would create a future focussed environment in the action research groups which would enable the participants to learn and develop. There are typically four phases in an appreciative inquiry process, although it is often argued that there is no one way of doing appreciative inquiry, it is more a way of seeing the world (Cooperrider and Whitney, 2005; Bushe, 2011; Watkins, Mohr and Kelly, 2011).

I decided to use the Cooperider and Whitney (2005) approach as this forms the basis of most of the other approaches to appreciative inquiry. Cooperider and Whitney (2005) suggest that the four phases of work are: discovery, dream, design and destiny (see diagram overleaf):

Fig 3:
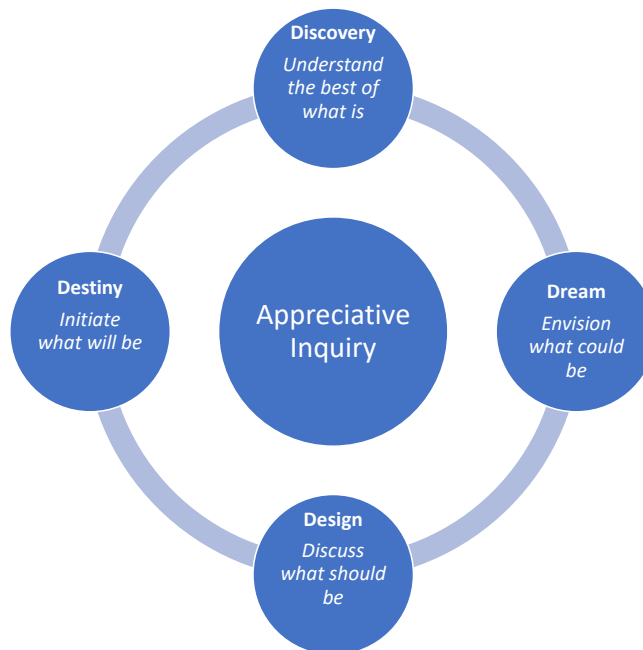
Appreciative inquiry diagram, adapted from Cooperrider and Whitney (2013)

In designing the action research group, I decided to introduce the principles of appreciative inquiry in the first group session and set the scene for the research. This would form part of the discovery stage and then the group activity would move through the other stages as the research progressed. The third action research group moved into the dream stage: gathering participant's views about their desired future for UK Mutual. The fourth group session focussed on design; gathering information about what the participants would like to be different. Finally, the last action research group focussed on destiny and action planning, discussing lessons learnt and how useful the process had been. In practice, the content would be more fluid (Fortune et al., 2015) but it was useful to have a plan.

Each group was designed in outline prior to the group taking place, taking into account the topics discussed previously and areas where I wished to obtain more information. Outlines of each of the group sessions are included in Appendix 2. The design of the first session made use of the topics identified in the semi structured interviews as a starting point and then opened up into a less structured discussion to get the views of the participants. Inevitably, the discussions in the group were more varied than the outline that was designed, in keeping with the action research tradition of involvement of participants (Gozzoli and Frascaroli, 2012), however having the outline helped me to ensure that I kept the discussion on topic, much like a "stage director" (ibid, p284).

3.4.2.3 Participant selection

Again, I turned to my contacts within the organisation to identify potential participants for the action research group. These participants were drawn from the departments of the individuals that I had interviewed but were taken from more junior levels of staff: the "worker bees" as one interview participant suggested. The participants were suggested by the interview participants based on their knowledge of organisation change within UK Mutual. Thus, a snowball technique was used to build a participant list for the action research groups (Corley and Gioia, 2004). All departments located at the UK Mutual head office were represented but other sites across the UK were not as the action research groups took place in a single location. One of the participants had recently returned from a secondment to another office and so was able to offer insights into this location. On reflection, it would have been

very interesting to get the views of employees from other locations to determine if they were different from those at head office.

Initially 12 participants were identified. As with the interviews, these individuals were invited to attend via email and if they expressed an interest in attending, they were provided with more information and a consent form. Seven participants attended the first action research group and this group continued to attend all subsequent action research groups, with one participant bringing an additional colleague with them who also went through the consent process. Demographic data was gathered on the participants including age, length of service and previous experience in the financial services sector. This is summarised in the table overleaf:

Table 3:

Participant	Gender	Length of service	Previous experience in sector?	Age	Highest educational attainment	Professional qualifications	Number of action research group (ARG) sessions attended	Duration of ARG sessions attended
1	Female	3.5 years	No	22 – 30 years	Postgraduate	Yes	4 (missed 1st session)	6.8 hours
2	Male	4 years	No	22 – 30 years	Postgraduate	Yes	5	8.25 hours
3	Male	3 years	No	22 – 30 years	Degree	Yes	4 (missed 3rd session)	6.5 hours
4	Male	10 years	No	31 – 40 years	A Levels/BTEC	Yes	5	8.25 hours
5	Female	7 years	No	31 – 40 years	Postgraduate	Yes	5	8.25 hours
6	Male	6 years	No	41 – 50 years	GCSE's	Yes	5	8.25 hours
7	Female	13 years	No	31- 40 years	Degree	Yes	5	8.25 hours
8	Male	4.5 years	No	41 – 50 years	Degree	Yes	5	8.25 hours

Data table, action research group participants

(NB: Session durations were ARG1 – 87 minutes, ARG2 – 107 minutes, ARG3 – 85 minutes, ARG4 – 98 minutes,

ARG5 – 118 minutes)

What is immediately noticeable about this group, in comparison with the interview participants, is the relative youthfulness of the group. This is also reflected in their length of service and also the fact that none of them have worked previously in the financial services sector before joining UK Mutual. They also have a wider range of educational attainment but all still have professional qualifications. When this was discussed in the group, they confirmed that they had all completed their Chartered Insurance Institute qualifications upon joining UK Mutual, as they mostly had customer facing roles initially. This group then is different in experience, both within and outside of UK Mutual, to the interview group, and so can act as a useful comparator.

3.4.2.4 Conducting the groups

Participants were informed (in the first group meeting) of the themes that had emerged from the interviews and given an opportunity to give their views on these themes. The themes were played back to the group to enable discussion and potentially to unearth previously untold stories (Donnelly, Gabriel and Özkazanç-Pan, 2013). The first session also focused on how the sessions would run and the need for all participants to respect the confidentiality of the information discussed in the meetings. This area of consent was discussed frequently during the group meetings to ensure that all participants understood their responsibilities (Chevalier and Buckles, 2013). Refer to section 3.5 for a more detailed discussion of ethics.

Each session was structured to discuss a number of key areas that had emerged from the interviews (for the first group) or from previous discussions (for all subsequent groups). There was also ample opportunity for the participants to mutually shape the discussions without feeling limited by an agenda imposed by me (Reason and Bradbury, 2006; Gozzoli and Frascaroli, 2012). Lunch was provided by me at each of the sessions, initially as a way to encourage people to attend and as a way to break the ice in the first session. I decided that holding the meeting over lunchtime meant that participants were unlikely to have other commitments at that time and would also create a more convivial atmosphere likely to lead to good conversations. I provided different types of food at each session and participants said that it became something that they really looked forward to.

Participants were given homework to complete between sessions, in particular to gather stories about the organisation and gather artefacts such as photographs that expressed how they felt about change in the organisation. These homework activities enabled a deeper focus on the participant's stories about change (Sintonen and Auvinen, 2009; Clark O'Hara and Cherniss, 2010; Bliesemann de Guevara, 2014; Rowlinson et al., 2014). Participants were also asked to create drawings in one action research group, to illustrate their views about UK Mutual at that moment.

For both the photographs and the drawings, once each participant had shown their images to the group, they were asked to talk about why they had chosen it and what the images meant to them. This led to more detailed discussions in the group. The images were photographed and the discussions transcribed as with the other outputs of the action research groups.

Ryfe (2006) highlights the importance of the role of the researcher in small group settings. He asserts that the researcher should be relaxed and open to enable participants to openly tell their stories, without being influenced by cues from the researcher (Ryfe, 2006). I knew that I would take a strong role in shaping the direction of the discussions in the groups by setting a broad agenda and keeping time but I wanted to make sure that the conversations that took place were shaped by the participants. Ryfe (2006) uses a continuum of facilitation to show the impact of the facilitator on the group. A strong facilitator will lead discussions according to their agenda whilst a weak facilitator allows participant stories to develop. He maintains that more stories will be generated by a weak facilitator, making this an appropriate model for my research (Ryfe, 2006).

3.4.2.5 Transcription and initial theme identification

The action research group discussions were recorded and were transcribed verbatim by a third party and NVivo was again used to code the data and identify themes for further analysis. The contribution of each individual participant was anonymous in the transcription but clearly, individual contributions were not anonymous in the groups (Chevalier and Buckles, 2013). Therefore, close attention was made during the consent process to ensure that all participants understood that they must keep any discussions in the group confidential. The transcriptions of each group meeting were shared with the group members for information and for review. However, given the volume of data that was created, I am not certain that these were reviewed in any detail by the participants.

The analysis of the images took place after the analysis of the other action research group transcriptions had taken place (Jenkings, Woodward and Winter, 2008). It was important for me to understand all of the data and identify recurring themes before analysing the content of the images so that I could attempt to identify the assumptions and meanings (Rose, 2016) behind the images (Cremin, Mason and Busher, 2011). A more detailed discussion of the analysis process is provided in the next chapter.

3.5 Ethics and consent

Having an ethical approach to research forms a key part of Tracy's (2010) framework for determining whether a piece of qualitative research is of good quality. As discussed earlier in this chapter, I used this framework extensively during the planning for my research to ensure that I created a piece of research that would add value. Therefore, I will continue to use the framework here to discuss how I addressed the ethical issues of conducting the semi structured interviews.

Tracy (2010) says that there are four types of ethical considerations that should be made: procedural ethics, situational ethics, relational ethics and exiting ethics. Each of these will be considered here in turn. I have combined the situational and relational ethics as, having reviewed Tracy's (2010) framework, I believe that they are too similar to be separated in relation to my research.

3.5.1 Procedural ethics

Tracy (2010) defines procedural ethics as those which are set by universities and other large organisations, which regulate research procedures. In the case of my research, I had to ensure that I abided by the university regulations and procedures for undertaking research by completing the ethics process and having this signed off before I started the research. Key to this sign off was ensuring that all participants understood the nature of the research before agreeing to take part and also knew how their data would be safeguarded.

To achieve this, I created an information sheet outlining the purpose and context (Brinkmann and Kvale, 2005) of my research that could be shared within the research organisation to enable the selection of participants and communication with senior stakeholders. I also explained to participants in this sheet and verbally when the interviews were being scheduled that they would be recorded and what would happen to these recordings (Bryman and Bell, 2011). This time spent briefing each participant, verbally and in an information sheet (Silverman, 2013; Gabriel, 2018a) was essential and after this had taken place, they were asked to complete a consent form. The form was emailed to them and then they returned it to me before the interview took place. The form was referred to at the start of each interview, reminding participants that they were free to leave the research at any time. This was an important part of the research process to ensure that they had informed consent but didn't seem to be important to the participants as most of them were surprised that they had to do it. They seemed to trust the research as they had already heard about it from a respected internal source (Macfarlane, 2010), i.e. the

senior stakeholders within UK Mutual who had approved the research. In addition, very few of them had experience of this type of research so they were unfamiliar with the rigour in which ethics are considered.

The procedural ethics for the action research groups are similar to those for the interviews in that a detailed information sheet was used to inform participants about the research and its purpose (Brinkmann and Kvale, 2005). This was referred to during the action research groups and participants were also reminded at each group meeting about the recording of the sessions (Bryman and Bell, 2011). Participants were also asked to complete a consent form. The form was emailed to them and then they returned it to me before the first group meeting. The form was referred to regularly throughout the research process. Informed consent is particularly important in group settings to ensure that all participants fully understand the purpose of the research and the risks and benefits to them from taking part (Chevalier and Buckles, 2013). The role of the participant is different to other form of research and there is a much greater level of involvement in action research by the participant, over a longer period of time.

All data (recordings and documents) was stored securely, on my personal computer, which was only accessible to me at my home (in a locked room and with password protection). All paper documents were shredded and securely disposed of once they had been used and all recordings were destroyed so that at the end of this process, the only data left were the anonymised interview transcripts (Bryman and Bell, 2011). I sent the transcripts of each interview to the participant for review and to give their

consent to use it after each interview and before the transcript was analysed. At this stage, the transcript had already been anonymised by removing participant names and other identifying information. This gave an opportunity for the participants to make amendments if they wished to before the transcripts were analysed.

All data from the action research groups was similarly securely stored and documents and recordings were deleted when they were no longer required. There were additional requirements for confidentiality as although I was able to ensure that the data I had collected respected the privacy of individuals through anonymisation, (Chevalier and Buckles, 2013), the discussions within the group could not be confidential. I spent a lot of time at the beginning of each action research group reminding the participants that the discussions in the room were confidential and were not for discussion outside of the room. I also ensured that when I was feeding back themes from the action research groups to organisational stakeholders, I did so in a way that did not compromise the confidentiality of the participants. My effort here was worthwhile though as the participants opened up in the groups, and this increased throughout the time that I met with them. This enabled me to gather rich data and a great level of understanding about their lives at UK Mutual.

It is important to note here that the recordings were transcribed by a third party. I decided to use a third party to do this to free up more of my time to undertake the analysis of the data. In order to ensure confidentiality, I discussed the nature of the research at length with the transcriber and received confirmation in writing that they would adhere to the same strict rules for confidentiality that I had agreed with UK

Mutual. In particular, as has already been discussed, the research organisation had to stay anonymous at all times, at the specific request of senior organisational stakeholders. The reasons for this have already been explored earlier in this thesis.

3.5.2 Situational and Relational Ethics

Tracy (2010) suggests two additional forms of ethics which go beyond what might be expected by a university or other institution. These situational ethics relate to the specific context of the research which must be considered in addition to the factors that are required to pass an ethics process. As well as this, Tracy (2010) recommends that researchers are reflective about their actions in relation to others who are involved in the research (relational ethics). This reflection is to ensure that researchers are always respectful to their participants and ensure that the research is of benefit to them at all times.

During the development of the research I spent time reflecting on my role(s) in this research and how this might have influenced my thinking and the direction in which the research travelled (Thomson and Gunter, 2011). This reflection involved thinking reflexively about my work, being self-critical and reviewing my approach and practice (Brinkmann and Kvale, 2005; Kara, 2013). As a novice researcher, I was trying to consciously be a 'good' researcher, acting in accordance with my values (Macfarlane, 2010).

There were additional requirements for the action research groups which were important to ensure that there was equal opportunity for participation in the research. Within the action research group, all participants joined in with the discussions in an equal way, with other participants encouraging the quieter members of the group to participate when needed. However, I cannot be confident that this research was fully inclusive across UK Mutual as the participants were suggested to me by people within the organisation rather than an invitation being made to all employees. This would have been the ideal option to ensure full participation but wasn't practical due to time constraints. My relationship with UK Mutual enabled me to have access to participants more easily than most researchers conducting similar research (Coghlan, 2007; Coghlan and Brannick, 2014). I recognise that this is an unusual situation and unlikely to be repeated elsewhere.

A challenge for this piece of research was maintaining ethics in the field over the duration of the research rather than simply conforming to an ethical research tick list or process at the beginning (Macfarlane, 2010). To ensure that I maintained the level of rigour that had been set at the beginning of the research, I regularly referred participants back to their consent forms and how the data would be used and stored. I also reflected on key concerns that I had as the research progressed. For example, how would I react if participants in the research groups had felt upset or concerned about what was discussed? How did I make sure that I didn't overburden the participants with my requests/time needed to meet with me? How did I ensure that they benefited from the research as much as I did? (Bryman and Bell, 2011; Heikkinen et al., 2012). In reality, the participants did not ever need extra support as

a result of the discussions at the sessions and they all seemed very happy to attend. I checked in with them regularly to check they didn't feel overwhelmed with the meeting schedule and also checked to make sure that they felt that our meetings were of use to them too. In the final action research group meeting, I asked the group what they had got out of the meetings and they agreed that it had been really helpful to have time to discuss organisation change and how it affected them.

I also reflected on my own practice regularly, considering the impact of my presence as researcher/participant in the action research groups and how this could affect group behaviour (Silverman, 2013). A particular concern was how I made use of informal data gathered at the water cooler (Fayard and Weeks, 2006) through the research process. As I continued to work at the organisation as a consultant for some of the time whilst I was undertaking the research, I was privy to conversations that did not form part of the research, despite being interesting and relevant to it. I could not use any information that I gathered through my work in my research due to consent. In contrast to the Fayard and Weeks (2006) study, individuals I talked to in the office during my consultancy work had not agreed to be observed and therefore I had to respect their privacy. To ensure that this separation occurred, the only data that I analysed and included in the research was from the recordings and transcriptions and not from any other sources. However, inevitably other information that I was party to during the research process will have influenced my thinking, even if I was unable to include the information as part of the research.

Despite the frustrations of doing this (some of the information that I gathered outside of the research was really interesting) I felt that it was important to maintain this separation. This was to ensure that the organisation was not compromised or embarrassed by my research and that any additional information that I was privy to by virtue of my position, was kept confidential. There are risks associated with this though, particularly whether my additional or pre understanding meant that I might ignore new information that didn't conform with my existing knowledge (Gummesson, 2000).

This duality of role as a researcher and a consultant meant that I had to be careful how I presented myself within UK Mutual. Was I an academic researcher or a consultant or both? (Coghlan and Brannick, 2014). I tried to be clear at all times about what role I was in when I interacted with key stakeholders. Other researchers have tried to do the same in their research, for example Ybema (2014), by positioning themselves clearly with different stakeholders depending on how they wish to be perceived (Ybema, 2014). This could be through dress or by explicitly stating their role at the start of every interaction.

As an example of the complexity of my role at the time, John was a senior stakeholder at UK Mutual who, during the course of my research performed many roles. At the beginning of the research, I tested my ideas with him. He then helped me to identify potential participants for the research. Once I had completed the action research groups, I met with him again to share some of the themes and get his views before I commenced the full analysis. Also for some of this period of time, I

was working for him as a consultant. Working with John in this way meant that he was able to help me but also that I was privy, during conversations with him, to data that any other researcher would not have access to (Thomson and Gunter, 2011) and which I could not include in my analysis. Our relationship was fluid (Thomson and Gunter, 2011) between my various roles and I had to try to separate my work with John as much as I could so he could be clear about which version of me he was talking to – researcher or consultant.

Reflecting on this now, I could have made the research process simpler by not working with UK Mutual during the research period but this would have been difficult as they were a major client of my business at the time. This type of insider/outsider research is not unusual though and Thomson and Gunter (2011) argue that the binary designation of researcher as either insider or outsider is not helpful in representing the way a lot of research is conducted. This issue of insider/outsider research will be returned to in the conclusion of this thesis.

3.5.3 Exiting ethics

The final piece of the ethics framework suggested by Tracy (2010) aims to ensure that ethics are considered after the data collection period has finished. At all times, the researcher should ensure that participants would feel satisfied that they have been fairly represented in the data and the analysis.

To ensure that I followed this in practice, I informed all the participants of my timescales for writing up and how the information would be disseminated within the organisation and outside of it (Tracy, 2010). However, in practice these timescales changed and reflecting now, I'm not sure if I did enough to keep participants abreast of what was going on. If I repeated the research, I would do more to keep participants informed, perhaps undertaking a final meeting with all the participants to tell them about the outcomes of the study.

As the timescales for the research evolved over time, it is uncertain whether the action research group participants really knew what they were signing up for when they agreed to take part (Bryman and Bell, 2011; Coghlan and Brannick, 2014; Fortune et al., 2015). I could definitely have been more proactive in communicating with the participants and the key organisational stakeholders after the research groups had finished and when I was analysing the data and writing up (Bryman and Bell, 2011; Thomas, 2016).

Another ethical concern was ensuring that I analysed and represented the vast amount of data generated in a way that enabled me to make sense of it (by creating themes) whilst also accurately representing what was gathered (Macfarlane, 2010). It was important for participants to feel that their views had been accurately reflected in the research and to do this, I conducted a final action research group once the initial analysis had taken place, to inform the participants of the key themes. I wanted to test these with them and see whether my understanding of the themes was consistent with their reflections on the group discussions (Habersang et al.,

2019). It was very encouraging to obtain their agreement to the themes, before I

continued onto developing more detailed findings. Interestingly, when they listened

to the themes and we discussed them, they acknowledged that they hadn't realised

how the discussions had occurred 'in the moment'. But, upon reflecting on the

themes, they agreed that they were a fair representation of what had occurred in the

action research groups.

Therefore, I was able to continue with my analysis after this discussion, confident that

the analysis represented the views of the participants. The analysis process that was

undertaken is discussed in more detail in the next chapter.

3.6   Methodological reflections

Reflecting now on my intentions when I commenced this research and the way in

which the research eventually concluded, there are a number of areas that are worth

reflecting on here. Firstly, whilst I had every intention of using action research and

appreciative inquiry as a means to create change within UK Mutual, the actual

outcome was different to my intention.   The underlying principles of both action

research and appreciative inquiry where used to structure and formulate the

approach to working with the participants to gather their stories. However, the final

stage of the process, where the researcher and the participants work together to

bring about change in the organisation, was eventually omitted.

This was for a number of reasons but particularly because a number of key stakeholders who had been involved in organising and supporting the research either left UK Mutual or moved into other roles. The intention at the start of the research was for me to write a management report based on the outcomes of the research and present this to the HR Executive Team and potentially also to the Board, with some involvement from the research participants. However, despite repeated requests from me to arrange such an opportunity to present, it did not happen. On reflection, perhaps I also did not push hard enough to make it happen as I was uncertain about whether the senior executives would like some of the outcomes of the study and so by not presenting to them, it avoided an awkward conversation. But, the consequence of the failure to do this presentation was that the change that I would have liked to create in the organisation didn't happen in the way in which action research and appreciative inquiry would suggest.

There was however, some change in practice which can be indirectly attributed to this research. One of the senior stakeholders who supported me in the research moved onto another change programme that was taking place at the same time as my research and decided to introduce a series of pauses in the programme so that she could check in with the stakeholders of the programme and determine their views. These were gathered and analysed for themes which were then fed back into the programme and adjustments were made to the approach used and communication and engagement strategies as appropriate. This change to the programme was seen to be successful and was a result of the discussions about the value of reflection during change programmes that I had had with the senior stakeholder as the research progressed.

Another reflection, now that the research has concluded, is that whilst I had a very positive view of UK Mutual at the beginning of the research, by the end, this view had become more negative, much like the research participants themselves. Because of my dual role as researcher and consultant, I had insider knowledge of the organisation which made me feel very engaged with it. But, some of the findings surprised and shocked me, leaving me feel less engaged and almost disappointed with UK Mutual as an organisation. I can see now that this led me to disengage from the organisation and made me less keen to share the findings of the research which again impacted on the extent to which this was truly a piece of action research or appreciative inquiry in the strictest sense.

4 Analysis: constructing the themes

A thematic analysis of the outcomes of the interviews and the action research groups was conducted firstly using NVivo to support the analysis of the whole of the data (Ritchie, Spencer and O'Connor, 2003) and then secondly using the Gioia Methodology (Gioia, Corley and Hamilton, 2013) to work with the data to create an enquiry using these themes (Clark et al., 2010). Following the thematic analysis, a visual analysis of a selection of stories and images created in the study was undertaken in order to more fully explore and interpret their meaning (Gabriel, 2018a).

In this chapter, firstly the approach taken to the thematic analysis will be examined, highlighting the approach chosen and the advantages and disadvantages of using this approach in the context of this research. In the next section, each phase of the thematic analysis will be detailed and the outputs of it discussed. Following this, a visual analysis will be presented. This will be shorter than the previous sections as fewer visual images were created in the study than narrative data. Finally, the chapter will conclude with a reflection on the outputs of the analysis process and a discussion of the limitations of the analysis of this research.

4.1 The thematic analysis approach

In this research, there was a combination of individual participant data from the interviews and group data from the action research groups. The same approach to analysis was taken for both forms of data however, clearly there are differences between the data sources. Ritchie, Spencer and O'Connor (2003) highlight the impact that group dynamics can have on the topics discussed in the group as well as the non-verbal communications that can take place within the group. These were noted by me during the interviews and action research groups and are referred to in the analysis where relevant. In addition, the participants could be influenced by others in the group in terms of what is discussed and in how much depth and the personalities involved which might impact on whether someone feels able to speak or not (ibid). It is even possible that participants may change their views during the action research group due to the influence of other people's point of view (ibid). A way to investigate whether this is the case is to go back to the original transcripts and recordings to determine if an individual's view changed during the course of the group meeting as a result of interactions with others.

To avoid having to do this, I decided to analyse the outputs of the action research groups on a whole group basis, treating the group as the unit of analysis (Ritchie, Spencer and O'Connor, 2003) so that I could analyse the discussions in the context of the group rather than separating out individual comments. Therefore, it was not necessary to analyse each participant's individual contribution but notes were kept of additional relevant information such as relevant body language and the impact of other participant's views on individuals (if significant changes happened to their views

during the group discussions). Whilst this approach does not allow the contributions of each participant to be compared for differences and similarities, it has the advantage of being less time consuming and also ensures that the outputs of the groups are analysed in context (ibid).

4.1.1   Data management using NVivo

NVivo was used following an investigation into the various computer based systems to determine which tool might be of most use (Basit, 2003; Saunders, Lewis and Thornhill, 2009; Silver, 2012) to respond to the research aims (Fisher, 1999) and enable the storage and coding of the substantial amounts of data that are generated through similar qualitative case study research (Darke, Shanks and Broadbent, 1998; Bansal and Corley, 2011) in a single place (Bergin, 2011). After consideration, NVivo was chosen as it is easy to use and also suitable for the analysis of the form and structure of the stories that would be gathered in the research (Seale, 2000; Bazeley, 2007), so that theories and concepts could be identified (Smyth, 2006).

Given the large volumes of data that this study generated (over 31 hours of interview/action research group recordings and over 300 pages of transcripts), NVivo was a useful tool (Ritchie, Spencer and O'Connor, 2003; Smyth, 2006; Palys and Atchison, 2012), to ensure that all this rich data could be stored and reviewed in a single place (Seale, 2000; Bazeley, 2007; Bergin, 2011). The amount of data generated was overwhelming (Ritchie, Spencer and O'Connor, 2003) and the time taken to analyse it was demanding (Basit, 2003; Bergin, 2011) but it was essential to

take the time to accurately and consistently code the data to support later analysis and interpretation and to ensure that I was fully familiar with the data. This would have been even more time consuming without the use of a package such as NVivo which was a useful tool to highlight key themes within the transcripts. However, given that the subsequent analysis was completed using the Gioia Methodology (Gioia, Corley and Hamilton, 2013), NVivo was only used at its most basic level to group key content areas together into themes/nodes rather than creating links between these nodes (Bazeley, 2007; Bergin, 2011) so perhaps NVivo was not used to its full capacity or usefulness, for example as a means to analyse relationships (Gibbs, 2002; Smyth, 2006; Bergin, 2011).

There are benefits to using NVivo as part of the analysis process as Smyth (2006) and Basit (2003) identify. For example, the development of a clear trail of the analysis and thinking in relation to the data could be seen to improve the rigour, reliability and validity of the research whilst maintaining flexibility in the coding process. However, this is very much reliant on the construction and accuracy of the nodes developed by the researcher (Fisher, 1999; Smyth, 2006; Bazeley, 2007; Bergin, 2011). As White (2009) warns, NVivo is only a method by which the researcher can store and organise their data, it cannot undertake the analysis on their behalf (Fisher, 1999). It is still necessary for the researcher to fully understand and work with the data (Basit, 2003; Ritchie, Spencer and O'Connor, 2003) to ensure that they can remain close to the data and that the information is not overly fragmented (Hollway and Jefferson, 2000; Leybourne, 2009).

There are however many critics of the use of qualitative research software. For example, some researchers state that it reduces the need for the researcher to interpret the data (Gabriel, 2018c) as the researcher can simply present the themes (or nodes) that have emerged from NVivo (or similar) without engaging with these themes to uncover multiple interpretations (Gabriel, 2018a). As Clancy and Vine (2019) state:

> despite the practical utility of existing models, imaginative interpretation requires more than the systematic identification of codes, categories and assumptions. Our capacity to imagine and interpret is tied to the person of the researcher, as well as to the emotions mobilized by putting the role of the researcher into practice (Clancy and Vine, 2019, p. 207).

Whilst I have presented "…snippets of interviews of conversations with different respondents in a decontextualized and fragmented way…" (Gabriel, 2018a, p. 142), the additional use of the Gioia Methodology (Gioia, Corley and Hamilton, 2013) before moving onto more detailed analysis enabled interpretation to take place.

4.1.2 Identifying concepts using the Gioia Methodology

It was important for me to engage fully with the data and be able to identify and describe key incidents that illustrated the area being studied and provided insight into the research aims (Bansal and Corley, 2011). Hence, the Gioia Methodology (Gioia, Corley and Hamilton, 2013) was utilised as a second stage analysis to enable the

analysis to be rigorous and focussed and yet still enable the identification of individual participant voices in the data (Eisenhardt, 1989; Corley and Gioia, 2004; Eisenhardt and Graebner, 2007; Clark et al., 2010; Bansal and Corley, 2011; Gioia, Corley and Hamilton, 2013).

The methodology is summarised in the diagram below:

Fig 4:
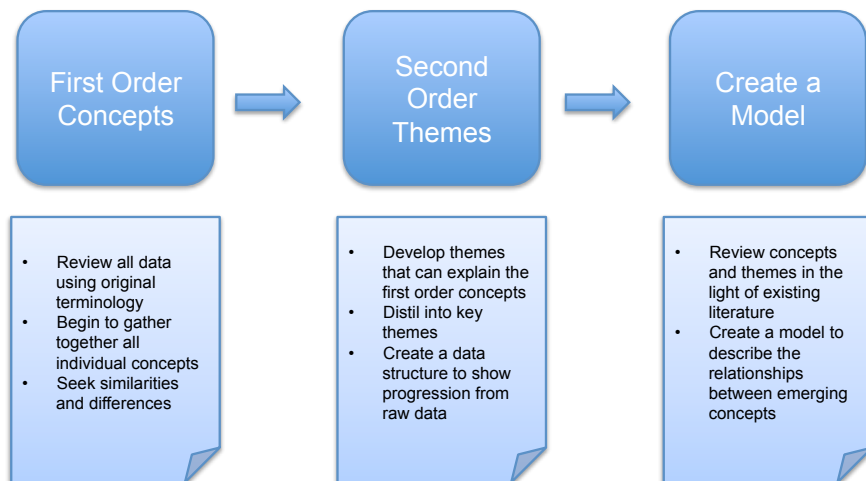
Gioia methodology diagram, adapted from Gioia, Corley and Hamilton, 2012

This methodology was originally developed as a means to create greater rigour in similar research projects by enabling data generated through the research process to be clearly linked to concepts and theories developed by the researcher leading to greater chances for the research to be published (Gioia, Corley and Hamilton, 2013). It was important that the initial phase of analysis was merely reporting back (Clark et al., 2010; Gioia, Corley and Hamilton, 2013) what the participants had said (first

order themes in the diagram) rather than trying to impose a structure to these themes and ideas (Ritchie, Spencer and O'Connor, 2003). The voice of the participants must be heard which is why the interview and action research groups were structured but still enabled deviation by the participants to focus on what was important to them. Gioia, Corley and Hamilton (2012) also recognise the contribution of the researcher to the analysis. Researchers can recognise links between themes to create concepts (second order concepts in the diagram) however without the evidence to back up where these links have come from, it is difficult to assert that this form of qualitative research has the rigour to be published (Gioia, Corley and Hamilton, 2013). The methodology attempts to address this by allowing both the voice of the participant (Ritchie, Spencer and O'Connor, 2003) and the voice of the researcher to be heard (Gioia, Corley and Hamilton, 2013), the links between them to be clearly visible and the meanings attributed to the participant's voices by the researcher to be evidenced and documented (Ritchie, Spencer and O'Connor, 2003) through the analytical process (Hollway and Jefferson, 2000).

4.2   The thematic analysis process and outputs

4.2.1   Phase 1 - Initial review and coding of the data

The transcriptions from the interviews and the action research groups were initially reviewed and coded separately. After each interview and action research group had taken place the transcript was loaded into NVivo and then coded (Corley and Gioia, 2004). This process took place systematically and continuously during the period of the research (Ritchie, Spencer and O'Connor, 2003; Clark et al., 2010). Initially, the

entire text was reviewed to ensure that I had a full understanding of its content and themes and was fully familiar with the text (Ritchie, Spencer and O'Connor, 2003). Then, recurring key words and themes were assigned as free nodes, i.e. unrelated to each other (Basit, 2003; Bergin, 2011) for passages of the transcription or individual words. Much of a transcript of the spoken word is redundant and therefore single words could be coded if they truly represented a specific theme (Gillham, 2000). This coding was done in one go, during another read through of the transcript (Robson, 2002). After a break, (Gillham, 2000) the transcript was then reviewed again with the nodes being edited or reassigned into hierarchies of grouped/related nodes (Bergin, 2011) as required before doing a final review of the entire text and coding to ensure that it made sense. In light of the inductive nature of this study, this seemed to be an appropriate approach to use (Robson, 2002; Basit, 2003) in order to make sense of the data using key terms from within the data rather than creating nodes prior to data collection (Basit, 2003).

This process was repeated for each subsequent transcript and the nodes were added to and refined based on the content of each transcript to create the final set of nodes. On occasion, where nodes did not have much data assigned to them, the contents were reassigned to another node (Bergin, 2011), ensuring that the nodes were "exhaustive … and exclusive" (Gillham, 2000, p. 60). In many cases, passages of a transcript could be linked to a number of nodes, indicating the interrelatedness of some concepts (Ritchie, Spencer and O'Connor, 2003). In addition, as Bergin (2011) identifies, the creation of new nodes became less likely with each subsequent transcription that was analysed as the data already fitted into existing nodes. These

concepts represented the initial themes from the discussions with participants and some early groupings of similar concepts but does not reflect any analysis of the deeper relationships within the data (Clark et al., 2010).

The image overleaf illustrates a section of the nodes that were gathered during phase 1 of the analysis:

Fig 5:

Screenshot of node structure

4.2.2 Phase 2 – Developing second order themes

The output from the initial phase of analysis was the set of concepts (nodes) held on NVivo as discussed above. This initial first order analysis was then incorporated into second order themes that represented amalgamations of the first order themes to avoid overlaps (Clark et al., 2010) and create linkages and meanings (McCracken, 1988). To support the development of second order themes, I sorted the raw data by node using the reporting functionality in NVivo, as shown in the screen shot on the previous page, (Basit, 2003) so that I could identify commonalities, similarities and differences and then group the data into second order themes (Ritchie, Spencer and O'Connor, 2003; Gioia, Corley and Hamilton, 2013) that reflected greater relationships in the data (Clark et al., 2010). Corley and Gioia (2004) refer to this as "axial coding" (p. 181) whereby relationships are identified as a means to create overarching themes.

Taking inspiration from Clark et al (2010) and Gioia et al (2010) regarding data structures, the diagram overleaf illustrates how the themes identified in the first phase were then linked into the second phase themes by examining overlaps, differences and commonalities:

Fig 6:

First order concepts   **Second order themes**

The organisation culture is very strong with consistent attributes that are valued by participants

Employees strongly identify with and are shaped by the culture

It is unclear about how the culture is formed but it is important to people that it is sustained

Fear of culture being lost and becoming just like everyone else

Company is seen as being different and want to protect this

→ **Cultural memory**

Seen as ethical by customers and employees

Strong fit between personal and organisational values

Doing the right thing and looking after people

Strong desire to work at the company before joining

Good reputation in the market – customer service

Mutuality makes us different

Strong financial performance

→ **Value congruence**

Change in leadership structure was a catalyst for change

More change than at any other point in history

Desire to get better at change and keep up with the market

→ **Change history**

Nostalgia for the past

Strong sense of history of organisation and traditions

History of organisation impacts on behaviour

Pride in history and the 'foundation story'

→ **Nostalgia**

Tension between long standing employees and new employees regarding change

Unwillingness to engage with change – organisational terrorists

Loyalty to the past organisation not the present

Mutualisation of employees and suppliers

Becoming tainted by the culture

Long service culture

→ **Change resistance**

Parent/child relationship

Fear of senior managers and retribution

Lack of honesty in communications – protectiveness

Politics are hidden but impact on behaviour

Hidden agendas

Passive aggressive politics such as not being invited to meetings

But, not everyone fits in (inclusion and exclusion)

→ **Fear of management**

Consultants used to get things done

New people coming in to drive change

Critique of behaviour of consultants as not being consistent with organisation values

Changing perceptions of participants over time of their role in change

Changing views of what is happening in the organisation – happy/not happy

Changing dynamic of participants with other parties in the change

→ **Outsiders and employee identity**

Data structure: first order concepts and second order themes

To provide an illustration of the raw data that led to the creation of the first order concepts and second order themes above, the table overleaf provides examples of the content of the nodes in NVivo which stand behind the data structure. This approach to illustrating the findings with representative quotes can be seen in other research (Maitlis and Lawrence, 2007; Gioia et al., 2010). These examples represent fragments of the narratives (Adorisio, 2014) that were gathered during the research however, they have been chosen to illustrate and support the analysis process. These fragments are sourced from multiple participants in the research to provide a coherent narrative for each theme (Brown, Gabriel and Gherardi, 2009).

Table 4:

Second order theme	Supporting first order data
Cultural memory	" Our culture works, don't try to fix it." (Participant, Action Research Group 5) "UK Mutual is a unique business and I know lots of organisations would say the same thing but it has many quirks and as you get to get familiar with those over the years you come to enjoy them." (Interviewee 3) "Lots of time spent when interviewing [for new joiners] to ensure that people fit with the culture. Don't want to break the chain." (Participant, Action Research Group 5) "I don't think [change is] a bad thing, it has to be welcomed but we do have to make sure we don't lose the culture we all know we have." (Participant, Action Research Group 1) "I'm not quite sure, I worry in some ways we're getting a bit too, I suppose dazzled by the bright lights of the different things over here when actually I would rather come back to the fundamentals of really serving our customers" (Interviewee 1) "I fear that this is the end of mutuality but maybe it isn't, maybe we will just continue as we were but better, a more modern version and in 20 years time we will still be here but being a better version of ourselves. I feel a really strong desire to protect and guard the culture" (Participant, Action Research Group 5)
Value congruence	"I also think that the values of the organisation fit very well with my own personal values so there's no conflict in terms of I'm expected, required or asked to do things that I find conflict with my own values." (Interviewee 6) "So those values that work for me, you know all the things that, you know, honesty, trust, teamwork, integrity – are the things that I hold true to so that's what I like about UK Mutual." (Interviewee 7)

Second order theme	Supporting first order data
	"It's the happiest place I've ever worked and the happiest place I have been while working and I just think for someone like me, as much as you would recommend the company as somewhere to work it's just not got that edge. But at the same time there is so many other benefits that keep you here. So you know you will persevere." (Participant, Action Research Group 4)

"And our willingness, in fact our purpose, our mission which is all about paying claims when our members and customers need them. Which I have always seen as a differentiator because a lot of insurance companies don't seem to have that as a priority." (Interviewee 3)

"… when I've driving home from work, I stop at a garage on route, … and I don't feel I need to take my badge off, and I can't remember doing that anywhere else. … It's really something isn't it, to feel proud to work for a company because actually I think they do right by their customers and I think that's what brings a lot of people into the organisation." (Interviewee 5)

"I think customer service is at the heart of everything we do and you see that through the organisation." (Interviewee 2)

"It's probably becoming that more of a commercial organisation, knowing that delivering great service to your customers is fine but it's value that you've got to deliver" (Interviewee 6) |
| Change history | "There is always the fear that we couldn't help people be happy forever though and still have a sustainable business, we couldn't keep using the investments to keep the rest of the company afloat, still responsible to our policy holders. … But I do accept that if we carried on the way we were going we would have started shrinking." (Participant, Action Research Group 4)

"I think in change terms over the last two or three years we have probably attempted to take on too much change and too much in terms of the scale of change and the rate of change in terms of the businesses capacity and capability for absorbing it which I don't think is a unfamiliar picture for a lot of organisations. What I would qualify that with is that we probably didn't have any choice, it's a business that's ripe for change, there is so many things that could make it even better, particularly in terms of its efficiencies and |

Second order theme	Supporting first order data
	processes and ability to serve the customer and its technology. So we need some big change programmes and initiatives." (Interviewee 3) "… I think [the organisation is] very open to change, wants to change, wants to stay, wants to be able to compete with the modern world, knows that it needs to move forward and needs to move on." (Interviewee 4) "We've had some changes at the top, I think that the CEO is the first CEO appointed from outside the organisation in 100 years. If you look at our top team now, [most] came from outside, whereas when I joined the organisation ten years ago, most of the directors … had been here for the whole of their career." (Interviewee 6) "I think for some people we're a little slow, so I think that's probably our weakness because we are old fashioned so we tend to do things in a fairly old fashioned way, which takes a bit of time." (Interviewee 5)
Nostalgia	"I'd describe UK Mutual as traditional… sort of built round a kind of parental model with a massive, huge sense of loyalty in the organisation so very loyal customers, very loyal staff, very long service and a little bit old fashioned but does what it says on the tin." (Interviewee 5) "[In interviews] we talk about growth and size of the company and history … and how it grew … and of this great history that's gone and the greatest success it has had." (Participant, Action Research Group 2) "We [have meals together], isn't it funny how it brings us all together and nothing more so here, when we win awards… we get cake." (Participant, Action Research Group 3)
Change resistance	"Well in this organisation if you haven't done 40 years, you are fairly new! So there is a bit of a cultural thing here about how long you are seen to be here before you are not considered new anymore which is very interesting." (Interviewee 4)

Second order theme	Supporting first order data
	"One of the last things my previous boss said to me when I handed in my notice was don't get 'mutualised! What do you mean don't get mutualised? And he said you will see and I thought right OK! When I came here I saw people who had been here 25 – 30 years and again they were form fillers and they did certain things in a certain way and I think that to me that was mutualised meant, almost Stepford Wives. People got this blank look and that's the way you do things." (Participant, Action Research Group 1)
Fear of management	"And no one has ever said [that you will be punished] but it's just that assumption that top floor management are here to just be on us and beat us with a stick and it's a very bizarre – I don't know where it comes from. It's a bit parent child isn't it?" (Participant, Action Research Group 1)

"There are so many good things here but I think the worst we have is communication or the lack [of it]. What we want is to be treated as an adult and told we don't want to do this anymore and why we are doing it." (Participant, Action Research Group 3)"

"There is a lot of sibling rivalry between departments." (Participant, Action Research Group 6)

"…it is pulling a really heavy weight behind you, … it's draining, it drains yourself, drains your resources very much. I also do feel that can stop your potential; I think it can really stop you and then the company reaching its true potential. I definitely think it's a heavy load on you." (Participant, Action Research Group 3)

"Although the organisation is very male dominated, it operates in a female way…very passive aggressive! I think the politics are very subtle. Could be something to do with people's length of service. If you know that you are going to be working with someone for 20 years then you will play the long game." (Participant, Action Research Group 6)

"When we are not told things we assume that there is a hidden agenda, I guess that's the phrase I would…for better or for worse which is that it's hidden and then it makes people uncomfortable." (Participant, Action Research Group 3) |

Second order theme	Supporting first order data
	"Some people … just fit and others just never could, it's weird isn't it?" (Participant, Action Research Group 1)
Outsiders and employee identity	"Isn't a consultant just another example of when we don't do stuff ourselves, just don't get on and do it? A consultant will come in and get on and do it…" (Participant, Action Research Group 4) "I feel a real sadness about the consultants who have come in and don't fit with us. They are swearing all the time and I feel let down by the organisation that no one does anything about it." (Participant, Action Research Group 6) "I think it is the people – the people who've come in from outside have commercial experience. We were very nice, and we still are very nice but now we're nice with a commercial edge." (Interviewee 6) "I don't feel as buoyant as I did last year. " (Participant, Action Research Group 4) "I feel that change is being done to us, there is a lot of defensiveness as we understand how things really work" (Participant, Action Research Group 5) "I am working more with external third parties than before and feel like I want to guard the culture from them!" (Participant, Action Research Group 5)

Illustrative quotes from the data for second order themes, adapted from Clark et al (2010)

4.2.3 Phase 3 - Developing the dimensions

The third phase of the analysis was undertaken by amalgamating and aggregating the emerging themes identified in the second phase into key dimensions (Corley and Gioia, 2004; Clark et al., 2010; Gioia, Corley and Hamilton, 2013; Habersang et al., 2019). This involved closely examining the themes identified and searching for relationships with the first order concepts to determine if the themes could be distilled and simplified into dimensions. These dimensions would illustrate the current situation in the organisation in greater clarity and might enable the creation of a theory. The dimensions and the linkages with the second order themes are as shown in the data structure overleaf (Maitlis and Lawrence, 2007; Clark et al., 2010; Gioia, Corley and Hamilton, 2013):

Fig 7:

First order concepts	Second order themes	Aggregate dimensions

The organisation culture is very strong with consistent attributes that are valued by participants

Employees strongly identify with and are shaped by the culture

It is unclear about how the culture is formed but it is important to people that it is sustained

Fear of culture being lost and becoming just like everyone else

Company is seen as being different and want to protect this

Seen as ethical by customers and employees

Strong fit between personal and organisational values

Doing the right thing and looking after people

Strong desire to work at the company before joining

Good reputation in the market – customer service

Mutuality makes us different

Strong financial performance

Change in leadership structure was a catalyst for change

More change than at any other point in history

Desire to get better at change and keep up with the market

Nostalgia for the past

Strong sense of history of organisation and traditions

History of organisation impacts on behaviour

Pride in history and the 'foundation story'

Cultural memory

Value congruence

Change history

Nostalgia

Organisation history

Tension between long standing employees and new employees regarding change

Unwillingness to engage with change – organisational terrorists

Loyalty to the past organisation not the present

Mutualisation of employees and suppliers

Becoming tainted by the culture

Long service culture

Parent/child relationship

Fear of senior managers and retribution

Lack of honesty in communications – protectiveness

Politics are hidden but impact on behaviour

Hidden agendas

Passive aggressive politics such as not being invited to meetings

But, not everyone fits in (inclusion and exclusion)

Consultants used to get things done

New people coming in to drive change

Critique of behaviour of consultants as not being consistent with organisation values

Changing perceptions of participants over time of their role in change

Changing views of what is happening in the organisation – happy/not happy

Changing dynamic of participants with other parties in the change

Change resistance

Fear of management

Outsiders and employee identity

Dynamic identity

Data structure, aggregate dimensions

The purpose of this data structure is to provide a visual summary of the analysis process and shows how the raw data progressed and was analysed to develop themes. The data structure is at the heart of the Gioia Methodology (Gioia, Corley and Hamilton, 2013) as a means to introduce rigour into the analysis process and provide a link between the data and the subsequent theory.

This diagram illustrates the relationships between the two dimensions that developed through the analysis and the first order concepts and second order themes that led to the dimensions. The dimensions that emerged all had an impact on how change was and can be introduced and managed in UK Mutual and whilst the diagram suggests that they are separate dimensions, in reality, there is overlap between them (Clark et al., 2010).

The process of development of these dimensions was not as linear (Corley and Gioia, 2004) as perhaps the data structure diagram suggests. In fact, the amalgamation of the themes into dimensions was a cyclical (Gioia, Corley and Hamilton, 2013) process whereby themes were returned to throughout the analysis. As Gioia, Corley and Hamilton (2012) suggest, I returned to the literature at the end of the analysis to consider the outcomes of the analysis in relation to previous studies. Whilst I had awareness and understanding of existing literatures in the broad field of study prior to conducting the research, the specific areas of literature in relation to the themes identified were not consulted until this point to avoid bias and to maintain the inductive nature of the research (Gioia, Corley and Hamilton, 2013).

There are limitations to the data structure. Gioia, Corley and Hamilton (2012) point out that it represents a moment in time of the research, a "…photograph [rather than] …a motion picture" (p. 22) and that to bring this to life, a model should be developed that is situated in the data and which explains the findings from the data in a theory and how these findings related to each other. In the findings and discussion chapters, I will investigate each of the dimensions in more detail, reviewing the data from UK Mutual and comparing it with existing theory, particularly considering the impact of these factors on change and on the successful implementation of organisation change.

4.3 Visual analysis

4.3.1 Introduction to the visual data gathering approach

The analysis of the images took place after the analysis of the other action research group transcriptions had taken place (Jenkings, Woodward and Winter, 2008). It was important for me to understand all of the data and identify recurring themes before analysing the content of the images so that I could attempt to identify the assumptions and meanings (Rose, 2016) behind the images (Cremin, Mason and Busher, 2011). I was interested in both the meaning of the image to the participant (Mannay, 2014) and the context in which it was produced, i.e. UK Mutual as an organisation and the research context (Banks, 1995). The images were used to extend the analysis of the transcript (Mannay, 2014).

There are some limitations to using visual data in research. In particular, some participants may feel uncomfortable being asked to draw or create pictures (Mannay, 2014) and so this may affect their willingness to participate fully. There are also ethical issues as it can be difficult to anonymise photographs and drawings (Mannay, 2014). This was certainly an issue in this research as I was unable to use some of the photographs that were elicited as they featured specific individuals and images that could identify the organisation being studied. This then limited the extent of visual analysis that I was able to undertake, so I may not have been able to use the visual data to its fullest extent to research meaning and provide additional detail to the narratives gathered (Bell and Davison, 2013; Rose, 2016).

4.3.2 Photo elicitation

According to Jenkings et al (2008), photo elicitation is becoming increasingly common in research as participants are easily able to access photos and images. Photo elicitation can be useful to provide additional detail to group discussions and interviews and to access different information about individuals and organisations. It also enables the researcher to understand more about reality for the participants, although detailed discussion of the images is required to ensure that all participants understand the meaning of the images chosen (Jenkings, Woodward and Winter, 2008). The photograph is a representation of the socially constructed reality of the individual but is also a useful way for participants to illustrate the everyday in an organisation (Bohnsack, 2008).

In one of the action research groups, I asked the participants to choose photographic images that were meaningful to them and that they felt represented something important to them about UK Mutual (Jenkings, Woodward and Winter, 2008). These images could be either publicly available photographs or images taken by the participants. After each image or images had been shown to the group, it was discussed in detail. As Jenkings et al (2008) note, it is this discussion that is important to create a collaborative research process and it is the role of the researcher to ask questions to draw out the meanings. This discussion enables new ideas to be created which can link into the broader themes of the research (Cremin, Mason and Busher, 2011).

4.3.3 Participant drawings

Bell and Davision (2013) identify how photographic data is dominant in visual methods rather than other forms of visual content. However, as already identified it can be very useful to encourage participants to create and draw images as a means to move beyond the familiar and enable participants to think about things differently (Bohnsack, 2008; Prosser and Loxley, 2008). Rose (2016) also recommends asking participants to draw images or collages as a means to understand their views about their identities. These drawings can give useful insights into the culture of the individual (Rose, 2016). In this study, I felt that it would be interesting to encourage free expression of ideas by the participants, drawing on the themes that had been identified in earlier action research groups. Therefore, free drawing by the participants would be the best way to do this without the constraints of trying to find

images that fitted their ideas and without the constraint of me imposing my research agenda onto them.

In common with the approach taken to eliciting photographic images, after each drawing had been completed by the participants, they were discussed in detail. The visual data and a content analysis of each piece of data is included with the relevant content in the following findings and discussion chapters.

5 Findings and Discussion – Organisation History

"[My son is] absolutely fascinated by one advert and the advert is kind of what I would like UK Mutual to be able to do at some point, you will have all seen it, it's the Lloyds advert for 250 years old, starts off you know ancient ago. He's absolutely mesmerised by it and watches it over and over again.

That advert obviously encompasses history … all the stuff at head office you see…. so really I would just like us to be doing in 100 years what we were doing 100 years ago. Those core ideas, its value for money but it's a first class service that goes with it and we understand that. If those two principles are upheld for 100 years then I would be quite happy …   There comes a point when you have to go back to the beginning and say if we're going to maintain what we are then what is it that we are? And I just feel that we're losing a little bit of what that actually is … but the core thing at the start of the company are basic simple things that I think aren't mentioned that much these days.

I guess it's just selling that vision, communicating it. Just extending what we did 100 years ago but fundamentally it's the same thing. We should go on the heritage because we can demonstrate to people that are still with us today that their forefathers were with us right at the beginning. We should. You can find people, we can trace it. … we've got a unique selling point but I think in this world and where it's heading to its just a real balance of a lean process verses delivering great service. It's a tough one and I think the bigger players of this world are more successful. Why are they more successful? Well because they have been doing things like we're [just] starting to do years ago. And they had that forethought, they could see what was happening and I think we were a bit slow on the uptake so it's a bit of catch up I think we're doing there."

5.1 Introduction

The above story was told by a participant in Action Research Group 4 in response to a question about how they felt that the history of UK Mutual influenced the way in which the organisation functions today. For this participant, not enough was made of the history as a means to attract new customers or as a vision for employees to get behind. Also highlighted in this story is the view that UK Mutual is somewhat slower to develop new ideas than other organisations in the market. The story illustrates the way that this participant felt that the history of the organisation has impacted on key aspects of UK Mutual today.

In the following two chapters, I will present the aggregate dimensions of history and identity in more detail, reviewing the data collected from UK Mutual using the multiple narratives (Brown, Gabriel and Gherardi, 2009) gathered from the interviews and the action research groups. Where relevant, for each dimension identified through the analysis, the views of the interviewees and the action research group participants will be compared to consider if there are commonalities and differences between them. The interviewees held more senior roles within the hierarchy than the action research group participants and thus may have experienced UK Mutual and the way in which change is managed in UK Mutual differently.

Also, the evidence gathered from the action research groups will be considered and compared over the duration of the study to determine if there were any changes in these stories over the duration of the study. Throughout, the data gathered in the

study will be compared with existing theory and literature, particularly considering the impact of these factors on change and on the successful implementation of organisation change. Following completion of the analysis, it was necessary to undertake a further literature review to investigate the emerging themes. This was due to the inductive nature of the research. As Clancy and Vine (2019) identify, by taking an inductive approach, the researcher identifies themes and areas that they are interested in at the start of the research but the detail emerges through the analysis. This can be a challenging process, particularly when there is a large amount of data to review but using the analysis approach outlined in the previous chapter and going back to the literatures, I was able to gain clarity. Back to Clancy and Vine (2019) - "having collected a large amount of data, I was confronted with a dilemma – how would I know what I would looking for?" (p. 211).

Many researchers have acknowledged that there has been a historical turn in organisation studies in recent years, much like the narrative turn referred to earlier in this thesis in relation to storytelling, (Clark and Rowlinson, 2004; Maclean et al., 2014; Hjorth and Dawson, 2016; Mordhorst and Schwarzkopf, 2017; Maclean et al., 2018). This increased interest in organisation history is linked with an increasing recognition that history is an important lens through which the present is viewed (Bell and Taylor, 2011; Mordhorst et al., 2015). Prior to this increased level of interest, according to Maclean et al (2014) much of the "…literature on management and organisation studies [was] fundamentally ahistorical in orientation…" (p.544). Mordhorst et al (2015) argue that this ahistorical stance was because "… the past was considered to be immutable…" (p.1277) but there are signs that this view is

changing. More research is being conducted into organisation history and more

specific journals have been created (Godfrey et al., 2016).

There have also been new pieces of research that have examined organisation

history in detail and have concluded that the past can be used in more flexible ways

than previously envisaged. Mordhorst and Schwarzkopf (2017) argue that

employees are able to use the past in different ways to created new interpretations

and these interpretations have an inherent "plasticity" (p.1165), i.e. they are flexible

and can be changed. This view is echoed by Godfrey et al (2016) who argue that the

past is "malleable" (p.599) and can be used to shape current actions and strategies.

Organisation history can also be used by managers to achieve their goals,

particularly during organisation change where historical narratives can be used to link

the past, present and future to create a clear mandate for change (Waistell, 2006;

Schultz and Hernes, 2013; Foster et al., 2017).

However, despite this understanding that history matters (Rowlinson et al., 2014)

there are still aspects of organisational history that have not been researched in

depth, in particular how history can be used to support organisation change (Maclean

et al., 2014; Foster et al., 2017). Much of the existing research into organisation

history is instead focused on stories about how organisations were founded, in

particular some of the classic business case studies that are taught in universities

(Rowlinson and Procter, 1999; Clark and Rowlinson, 2004; Maclean et al., 2014;

Mordhorst and Schwarzkopf, 2017). Dawson (2014) argues that there is an implicit

understanding that over time, i.e. as time progresses, change will occur but that

considering organisation history in the context of organisation change is an under researched area. He suggests that this could be due to the unquestioned assumptions that have been made in the change literature which is predominantly focussed on a linear view of change (Dawson, 2014). In this literature, it is assumed that if a series of steps are followed, change will occur (see section 2.6.1 for a more detailed review of the change literature). Therefore, this literature is always forward looking rather than making reference to the past.

In this chapter, the four second order themes relating to organisational history at UK Mutual that were identified in the analysis will be discussed in detail. These were cultural memory, value congruence, change history and nostalgia.   For each theme, the data gathered will be discussed alongside relevant existing literature. Due to the fact that this research was conducted over three years, I was able to gather narratives from the participants over a period of time. This is often difficult for researchers to achieve due to research constraints (Ancona et al., 2001). For each theme, the data gathered will be discussed in relation to differences between the interviewees and the action research group participants. In addition, changes to the views of the action research participants over the duration of the study will also be discussed where these occurred.

5.2   Cultural memory

Organisation memory has been defined by Maclean et al (2014) as "…the re-enactment of a shared historical narrative…" (p. 545). This shared history binds employees together and creates a clear identity about what it means to work in an organisation and what values and behaviours are acceptable (Seaman and Smith, 2012). In this way, an organisation's culture has a historical aspect, drawing upon the past in defining the organisation in the present (Rowlinson and Procter, 1999) and, for some researchers, it is impossible to separate organisation history and culture (Clark and Rowlinson, 2004). Mordhorst and Schwarzkopf (2017) define this as the "… uses of the past…" (p.1165) approach, where the organisation history and culture shapes employee's sense of self and behaviours (Ybema, 2014; Foster et al., 2017). But often, history is not considered in descriptions of organisation culture, beyond gathering stories about the organisation's founders (Rowlinson and Procter, 1999; Clark and Rowlinson, 2004). These founding stories (Schein, 1987) are not usually linked to actions and behaviours in the present and, according to Rowlinson and Procter (1999), little mention is made of "…the darker side of companies … that sometimes surface in business history…" (p.372). In this section, I will detail the findings relating to cultural memory and organisation history at UK Mutual and link these to the relevant existing literature.

There was overwhelming agreement amongst both the interviewees and the action research group participants, that it was really important to maintain and protect the unique culture of UK Mutual during periods of change, as illustrated in the story at the

beginning of this chapter. This appeared to be an area that they hadn't considered prior to taking part in the study. Interestingly, when the analysis was discussed with senior stakeholders within UK Mutual as part of the feedback process from me, there was surprise at the depth of feeling from participants about their desire to protect the culture and also how little that this had been considered as part of ongoing change programmes. Whilst this might seem strange given the strong sense of culture and history within the organisation, I believe that the surprise of the senior stakeholder group represents the immaturity of UK Mutual when it comes to dealing with change. As an organisation, it has not undergone extensive transformation previously in its history and so many senior people in the organisation were inexperienced in dealing with change. Therefore, the degree of passion that employees felt about the organisation culture had been significantly underestimated and the impact that this could have on potential change programmes had simply not been considered.

Organisation culture is a field that has been extensively studied and discussed, both in academic and popular business literature and yet it remains an area that is hard to define (Schein, 1990; Rowlinson and Procter, 1999; Weeks, 2004; Van Maanen, 2011) as the term culture is applied to many different things (Schein, 1990; Rowlinson and Procter, 1999; Weeks, 2004; Mike, 2014) And for the researcher, this is difficult as if it is hard to define something, it can also be difficult to study and measure it within the organisation (Weeks, 2004). This may be because self-identifying groups, for example specific occupations and demographic groups (Van Maanen, 2010), will construct their own culture in order to create meaning (Fayard and Van-Maanen, 2015). This has given culture a much broader reach than simply

within organisations. Within individual organisations too, there may be many cultures rather than one which pervades the whole organisation (Stanford, 2010; 2019).

Within this research, the notion of organisation culture was often discussed by the study participants and yet it was difficult for them to clearly articulate UK Mutual's organisation culture at first. The idea of culture has entered popular parlance as a way of describing how it feels to work in a particular organisation although this definition in itself is unsatisfying in its lack of clarity according to Weeks (2004). The definition of organisation culture that I have used here is as suggested by Bliesemann de Guevara (2014):

> a set of structures, routines, rules and norms that guide and constrain behaviour (a relatively stable structure defining what actors can legitimately do) and at the same time a dynamic phenomenon that surrounds us at all times, constantly enacted and created by our interactions with others and shaped by leadership behaviour. (Bliesemann de Guevara, 2014, p. 618).

This definition, based on the work of Schein (1990) is pertinent to this study as it reflects the various elements of an organisation's culture which are required to be understood in order to address its impact on the way that change can be managed in an organisation. Whilst it was possible to gain an understanding of some of the formal elements of the culture of UK Mutual from publicly available materials prior to beginning the study it was actually the less visible elements of the organisation culture that were of most interest. These were gathered through the interviews and

the action research groups and which form the basis of these study findings. At this stage, it's useful to describe the UK Mutual in more detail, as it was described by the participants. I have used Schein's (1990) model here to structure this section.

5.2.1 Schein's model of organisation culture

Schein (1990) developed a three level model to describe an organisation culture and it is this that will be used here to describe the organisation culture at UK Mutual (Bliesemann de Guevara, 2014; Mike, 2014; Fayard and Van-Maanen, 2015; Schein and Schein, 2017). The diagram below summarises the model

Fig 8:

Organisational artefacts
(tangible processes and structures, easy to gather but hard to interpret)

meaning

Espoused values
(strategies, goals, vision, values)

meaning

Underlying assumptions
(unconscious beliefs, taken for granted assumptions, ultimate source of action)
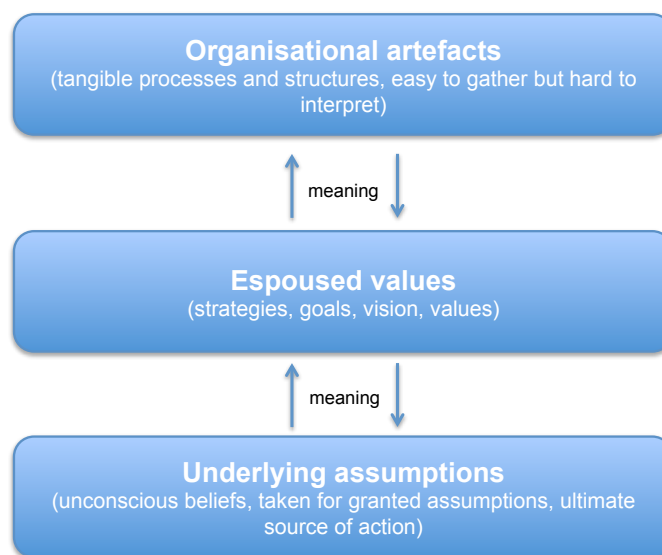
Schein's model of organisation culture, adapted from Schein and Schein (2017)

Researchers consider that Schein's work provides a readily understandable means to comprehend an organisation's culture (Fayard and Van-Maanen, 2015) which also enables a researcher to focus on many aspects of organisation culture rather than just one factor such as management style (Mike, 2014). During this research, rich data was gathered over a period of time about UK Mutual and its key characteristics and therefore, Schein's model is an appropriate way in which to investigate these various characteristics. In particular, the research has dug below the surface level of UK Mutual and attempted to understand the deeper aspects of its culture, and using Schein's model as a guide enables these aspects to be considered.

According to Schein (1990), on a surface level, an organisation's culture can be understood through looking at organisational artefacts and ways of working such as dress code, use of office space, communication style and materials, and organisation rituals (Bliesemann de Guevara, 2014; Hogan and Coote, 2014). These artefacts provide a context to employees to enable them to understand and make sense of the organisation in which they are working (Hawkins, 2008; Hogan and Coote, 2014). Clearly these manifestations of the organisation culture are easily obtainable but do represent how the organisation may wish to be perceived and so may be of limited value to the researcher in truly understanding the deeper elements of organisation culture (Schein, 1990). As Fayard and Van-Maanen (2015) identify, these aspects of organisation culture are understood through the frame of reference of the researcher and the study participants and so claims by a researcher that they truly understand an organisation culture through artefacts cannot be made with confidence. Schein (1990) agrees and argues that gathering information and stories

about organisation artefacts and rites in an attempt to understand culture does not reflect the full culture which will be broader than these elements.

At a deeper level then, an organisation culture includes common beliefs and values which are reflected in the objectives, vision and values of the organisation (Schein, 1990; Bliesemann de Guevara, 2014) as well as behavioural norms (Hogan and Coote, 2014). Bliesemann de Guevara (2014) suggests that the stories that are told in organisations play a key part in communicating and maintaining beliefs and values and the unspoken assumptions that underpin them (Schein, 1990).

Finally, there are the unspoken beliefs that embody the deepest level of culture and these are implicit in the behaviours and actions of individuals in the organisation (Hogan and Coote, 2014) and can be gathered through detailed interactions with key organisation stakeholders (Schein, 1990; Bliesemann de Guevara, 2014).

Bearing in mind Fayard and Van-Maanen's (2015) warning about researchers attempting to understand an organisation culture from the outside, in the next section I will explain the culture of UK Mutual purely from the stories and descriptions that I have gathered from working with the participants over the duration of the study. A description of the organisation, in terms of key dates and events, is provided in section 1.4.

5.2.2 Key characteristics of the UK Mutual culture

The discussions in both the interviews and the action research groups often reverted

back to the organisation culture and what it was that made UK Mutual a unique place

to work, with both sets of individuals agreeing that it was the culture and reputation of

UK Mutual as a place to work that encouraged them to join it in the first place. I was

often told that there was something different about UK Mutual as a place to work and

this was what had made people stay in the organisation for long periods of time.

Many participants felt that the organisation culture was part of the reason for its

success. There was a view by some of the participants that the culture had remained

unchanged over time evidenced by repeated stories about the way that the

organisation was founded and how this had influenced the success that UK Mutual

had today. Although there was no empirical evidence available to suggest that this

was the case, for most participants it was simply a feeling that they had.

This supports the findings of Fayard and Van Maanen (2015) in their ethnographic

study at Trifecta, a large family owned firm based in the US. Here, the researchers

found that claims were made about the impact of the Trifecta culture on

organisational success and they discovered that these claims were also not based on

strong evidence. Extending this, Hawkins (2008) concluded that this lack of evidence

does not mean that these claims are not important. They reflect the way in which

culture is imbued with meaning and it is this meaning which gives employees the

passion for working at a particular organisation (Hawkins, 2008; Fayard and Van-

Maanen, 2015). So, at UK Mutual, there is a belief in the strong organisation culture

which sets the tone for how employees want to work together and also the way in

which leaders and managers want employees and the wider industry to perceive UK

Mutual (Mike, 2014). Fayard and Van-Maanen (2015) refer to this as "…cultural

fundamentalism…" (p.20) whereby leaders attempt to impose a strong, common

culture across the whole organisation and dissuade employees from behaving in

ways that are outside of the cultural norms.

Schein (1990) argues that that the idea of an organisation having a strong culture is

not uncommon in organisations like UK Mutual which have a long history and where

the original founders of the organisation had values which still permeate the

organisation today (Mike, 2014). But, the idea that an organisation culture remains

unchanging over time and is somehow transmitted continuously over the years to

different organisation stakeholders has also been challenged by some researchers

for example, Van Maanen (2011). However, in Mike (2014), Schein argues that it is

very difficult to change an organisation culture without fundamentally changing the

organisation leadership and in fact, the culture evolves over time. To provide further

detail of key elements of the UK Mutual culture, the next section illustrates how these

elements can be mapped across to the Schein model of culture.

5.2.2.1 Cultural artefacts and manifestations

Based on Schein's model (Schein, 1990), the first level of culture at UK Mutual, i.e.

cultural artefacts and manifestations, shows an organisation with a very positive

working environment. UK Mutual's offices are set in the countryside and employees

work in modern buildings with excellent training and leisure facilities including a

swimming pool and sports club at head office. This office environment suggests a

company that values employee wellbeing and development. UK Mutual is structured

in such a way that there are local and regional offices within reach of customers, with

most customers being only a few miles away from the nearest office suggesting a

desire to be close to customers and provide good service. Information about the

history of the company is featured on office notice boards, in displays in the central

hub/visitor meeting area of every office and in promotional and training materials.

Photographs of existing employees and past Chief Executives feature prominently in

office décor, suggesting that the history of the organisation is important. The history

of UK Mutual is very visible wherever you go within the company.

5.2.2.2 Espoused values

The second level of culture, the core values and beliefs of an organisation according

to Schein (1990), is represented within UK Mutual by six key dimensions, displayed

prominently within the workplace, which focus on fairness for customers and

employees, strong and sustainable financial performance, development and rewards

for employees and a strong sense of community. These dimensions then are the

official version of the organisation culture (Fayard and Van-Maanen, 2015). Most of

these dimensions can be linked back to the way in which the organisation was

founded and continue to influence the organisation culture today. These are

considered in more detail below.

5.2.2.2.1 Mutuality and ethics

UK Mutual continues to operate as a mutual and employees continue to value this aspect of the organisation. Research participants regularly mentioned the mutual status of the company as a reason why they both joined and stayed with UK Mutual, for example:

"… I didn't want to, you know … I wouldn't want to work for a credit card company, I don't have interest in working for a bank. I wouldn't want to work for an insurance company if it wasn't mutual personally so it would fit with my ethics, so that is part of the reason why I came here."

(Participant, Action Research Group 1)

The values of UK Mutual are clearly stated to all new and potential employees and to customers on their website and a key aspect of this is the strong ethics which underpin all its commercial and customer relationships. Back when the company was founded, it was set up as a mutual as it suited the founders' purpose for the company to be a means to bring people together. However now, this status is rarer in the market following demutualisation in the 1990's and as a result, perhaps more highly prized by new and existing employees.

5.2.2.2.2 Customer service

UK Mutual is also recognised in the industry as providing excellent customer service, receiving a variety of awards from organisations such as Which?, Defaqto and

Moneywise. During my time at UK Mutual, I heard a number of stories of individual employees who had gone above and beyond to meet customer needs and these date back right to the time when UK Mutual was founded. I heard stories about how during adverse weather conditions, employees had travelled to the homes of policy holder's to give them money to stay in hotels rather than have to stay in a flooded home and how one of the early Directors saw a house fire at a policy holders house on his way home from a board meeting in 1913 and assisted with putting out the blaze. These stories were told with great pride.

Participants contrasted the behaviours exhibited in these stories with the behaviours that you might expect from an employee from other insurance companies. These stories were seen by participants as differentiating factors between UK Mutual and their competitors and were linked in part to mutuality, as the focus could purely be on the customer rather than paying shareholders dividends, but also to the core tenet of the company that:

"We pay claims – [we] assume everyone is OK. Other firms such as Aviva assume that every claim is fraudulent."

(Participant, Action Research Group 5)

Given how the organisation was founded in a locality, by individuals who all knew each other and who also knew all the first policyholders, this focus on putting the customer first is intrinsic to the way in which UK Mutual was first organised and how it continues to operate:

"Fundamentally I think we have a heart. I really do, in all of the companies I have worked for we genuinely care about our customers and I think we really, really do care about our customers and so I think at the crux of this whole foundation of us there is a real genuine heart in the business. I think there are more amazing people here than not. Just great people, yeah for me it's got a heart."

(Participant, Action Research Group 3)

5.2.2.2.3 Financial prudence

Despite being a mutual, being profitable is still key, both as a means to invest in the organisation but also to provide rewards to members. The UK Mutual books highlight the founding fathers' (for they were all men) desire for continuity, to provide a service for their members in the future by ensuring the survival of UK Mutual through prudent decision making and financial management and continued profit making. The books tell the story of the early expansion of UK Mutual from 1912 onwards to cover more geographical areas and how this was considered carefully and cautiously by the Board before going ahead.

This careful decision making continues today, with the time taken to make decisions highlighted by participants as a key frustration about working at UK Mutual, for example:

" … you know when you first arrive and you feel people move very slowly and you know, are people just a bit slow? And then you realise they're not slow because they're stupid, they're slow because they're careful and there is an incredible amount of knowledge and experience and expertise and

again they are slow because they are wanting to get it right. Perhaps maybe too far with the checking and double checking, triple checking figures. Sometimes there are some inefficiencies in there as well but it's understanding the reasons for it being slow is the other side of it."

(Participant, Action Research Group 3)

It's interesting to think that the way that the organisation was formed (around a table with each of the Directors having a say in how it operated and with a desire to remain consistent in a very volatile industry) has influenced the way that UK Mutual operates today. Research has suggested that norms (in relation to time) are created in organisations based upon their history, and these norms can affect speed of decision making and accepted behaviours such as being punctual (Blount and Janicik, 2001). From my own experiences at UK Mutual, it can seem that decision making is painfully slow, leading to paralysis by analysis, (Langley, 1995), with consensus having to be reached by all parties before a decision is made. In part, this characteristic can explain the desire for anonymity in this thesis – it would simply take too long for all interested parties to agree to the content of the thesis for the organisation <u>not</u> to be anonymous!

5.2.2.2.4 Family values

The early foundation of UK Mutual was very much family orientated with family members working together to set up the business. In addition, the books highlight families who have been insured by UK Mutual for generations, with photographs of policy certificates dating back to the 1920's. I also heard many stories during the

action research groups about married couples working together and generations of the same family working at UK Mutual. Employees are well looked after at UK Mutual, with attractive offices in out of town sites, competitive rates of pay and excellent benefits such as an on-site sports club and health insurance. This is reflected in low levels of employee turnover. These benefits are valued by employees and UK Mutual consistently performs well in their annual employee survey, which shows good levels of employee engagement.

This sense of wanting to look after their employees (and employees expecting to be looked after) is driven perhaps by the strong culture that pervades (despite attempts to become more up to date) and dates back right to when the organisation was founded. There is a culture of long service, which is highly prized, although not so much by this participant:

"… when I came into the team … the thing I noticed the most [was] the age demographic because I come from an office … where one massive turnover of staff, basically revolving doors in every office I worked in, … it was all people a lot older than me, kind of maybe towards my parent's age and on my first day, and I will remember this forever, you get shown round and it was almost like the selling point was this is Reg. Reg, how long have you worked in insurance? This is Pete, Pete how long have you worked here? You know it was amazing that people had worked for the same company for longer than I had been alive! It was really impressive but this is totally their life. Also I think they have…and maybe rightly so, they have a sense of I have basically given you my whole career, that's why you should look after me. I think there is maybe an element of expecting to be treated really, really well because they have literally never worked anywhere else?"

(Participant, Action Research Group 4)

5.2.2.3 Underlying assumptions

Finally, the deepest level of the organisation culture is represented by underlying assumptions and beliefs. Employees can be exposed to these assumptions throughout their recruitment processes, when potential employees are tested to see if they have the right values and assumptions for the organisation (Schein, 1990). They can also be exposed to these assumptions again in their induction and through other processes that they will be subject to in the organisation, such as appraisals.

There were a number of assumptions that were uncovered early on in the research through initial discussions. For example, the culture of UK Mutual was seen as something that sets UK Mutual apart as an employer and this was a view that was held by many of the participants. Other companies within the insurance sector were perceived to be very different, typically focusing less on customer satisfaction and caring less about employees. Even employees who had never worked anywhere except for UK Mutual felt that this was the case.

In addition, most participants agreed that there was a strong link between their own personal values and the culture and values and UK Mutual and this was a key deciding factor in their decision to both join and stay at UK Mutual. There were positive and negative aspects of this though. Some action research group participants felt that employees with the right values, i.e. those that were similar to those valued at UK Mutual, would fit in and enjoy their time at UK Mutual. There were stories of individuals who had joined and simply didn't fit in and eventually left

UK Mutual.   For many participants, the reason for this strength of culture and the difference between UK Mutual and other organisations in the same sector was the mutual status of UK Mutual and the impact that this has had on the way that the organisation operates.

5.2.3 Interview findings

Amongst the interviewees, there was broad agreement that the culture of UK Mutual was something important that needed to be protected. However, there was also recognition that there was a need for change in order to continue to be successful and keep up with a changing market:

"I think that the essence of what we're trying to do is change sufficiently to keep on top of the market conditions without damaging that essence of who we are and that's the dilemma I suppose - it's hard."

(Interviewee 5)

This recognition of the challenge and contradiction between protecting the culture and moving forward was very common amongst this group of participants. But despite the difficulties in doing so, the interviewees overwhelmingly supported the need for change. The interviewees did recognise though that some changes would be difficult with one commenting that they felt that UK Mutual was moving too far in the direction of other financial services organisations, due to changes in work processes and systems, and becoming like "… City boys…" and that that made him uncomfortable.

However, there was also a more robust response to this challenge by some interviewees, particularly in relation to how individuals in their team were reacting to change. One of the interviewees said that she had been very open with people in her team and told them that if they didn't like what was happening in UK Mutual, there was a big world out there and they would find something else that would suit them better. This response was unusual in its apparent frustration about employee reactions to change and also in its departure from the UK Mutual culture of support to employees. Interestingly, this interviewee was a relative newcomer to UK Mutual, having joined only a few years previously from outside of the insurance sector and so these views may reflect her own frustrations about the UK Mutual culture. She may also have more balanced views about change having joined fairly recently and therefore having more understanding of the world outside of UK Mutual than many others.

5.2.4   Action research group findings

5.2.4.1 Participant views at the beginning of the study

There were similarities between the views of the action research group participants and the interviewees, again with the employee group being cautious about changes that might impact on the culture of UK Mutual in a negative way. There was a desire to maintain the elements of the culture that makes UK Mutual different to other insurance companies, for example in the way that staff are treated:

"… and you don't want to lose that as part of the process of making things slicker and making things more professional and expecting more and people to behave more professionally which sometimes means you are expected to do extra hours and not worry that you are on a seven hour contract, you know things like that which can rub people up the wrong way…take long enough to appreciate what you have got, you know what you are trying to preserve, don't just come in and change things quickly."

(Participant, Action Research Group 5)

5.2.4.2 Participant views at the end of the study

There was a shift in the action research group participant's perceptions over time of the organisation culture and their role within the organisation. This shift was a shift towards wanting to be protectors of the culture and was reflected in the language and images that the participants used during their ongoing discussions in the action research groups. In particular, metaphors were regularly used by the participants to illustrate their stories, perhaps as a mechanism to enable their thoughts and meanings to be transferred to others (Waistell, 2006; Arnaud, 2012) or to make unfamiliar situations such as organisation change feel more familiar (Waistell, 2006). These themes are discussed in more detail in later sections of this chapter.

5.2.5 Comparison between interviews and action research group findings

There were some subtle differences in the way that managers and employees expressed their feelings about the culture at UK Mutual and their desire to protect it. Generally, the manager group (the interviewees) were more positive about the need

to change, whilst still having a degree of fear about what might be lost in doing so. The employee group (the action research group participants) were more sceptical about whether it was possible to change and still maintain the elements of the organisation culture that they valued. There was a real sense of loss within the group about organisation rituals and artefacts that had been taken away as a result of efficiency drives, for example the opportunities to meet and eat together in groups and the office swimming pool. The degree of change at UK Mutual was also a source of fear and worry for them.

The interviewees were more positive about change as illustrated by the following quote from Interviewee 5:

"If you tell somebody you're going there, you stay on that course and alright you go round the rapids or you go round the boulder in the middle of the river, but you keep going down the river and so there's a consistency about what you are saying."

Here, the individual is suggesting a feeling of loss of control as you go down the river but that as long as you keep heading in the same direction, the outcome will be good. Perhaps the fact that the interviewees came from a more senior group, they had more information about the changes that were taking place and those which were planned for the future, which gave them a different perspective on change and a greater feeling of control. This is similar in nature to another water themed metaphor for change related by Brown, Gabriel and Gherardi (2009), "there is a change that merely repeats an earlier pattern and therefore leaves everything exactly as before. Like the movement of the waves, such change is one of continuous repetition, one

that can be anticipated and, to a certain extent, controlled" (p. 328). Similarly,

Conroy (2010) also tells a story of change where the narrator uses a river as a

metaphor. Here the narrator talks about river flows and currents in relation to leading

change and setting the direction or the organisation (ibid). For example, leaders

talked about "now we're flowing back and almost flying ahead of the current" (ibid, p.

241) and "making your own path down the same river" (ibid, p. 242). Interestingly,

the action research groups discussed their own river metaphors for change which are

discussed later in this chapter.

5.3   Value congruence

Maclean et al (2014) discuss the "… inseparability of interests…" (p.554) between

organisational values and the values of an employee and how these values drive

particular behaviours. At many organisations (including UK Mutual) the scope of the

organisation is expanded to include other areas of employee's lives such as the

creation of sports and social clubs (Maclean et al., 2014). For an employee, this

linkage between the personal and the organisational is very important and gives a

sense of continuity and comfort (Gioia, Schultz and Corley, 2000).

The perceived reputation of UK Mutual in the insurance sector was discussed at

length in both the interviews and the action research groups and there was broad

agreement across the groups that UK Mutual was seen as a successful organisation

in terms of financial performance and as an ethical organisation both as an employer

and as a supplier, as discussed in section 5.2. Aula and Mantere (2013) argue that

every employee will have their own version of the reputation of the organisation that they work in and this is the case for other stakeholders such as suppliers, and it is these stakeholder relationships that are essential to building a good reputation. Whilst organisation reputation is intangible, it can be represented through organisational artefacts and through communication materials (Aula and Mantere, 2013). This is certainly the case at UK Mutual where awards and accolades are prominently displayed in offices and online. In addition, links that have been made with charitable organisations and donations raised are also on display in each office location, reinforcing the ethical stance that UK Mutual is known for through tangible artefacts and management behaviour (Burnes and Jackson, 2011).

This view of UK Mutual as a good organisation was also seen to be due to a congruence between personal values and the values of UK Mutual. This was a key reason for many to join the organisation, as they felt that they could feel comfortable in an organisation that took an ethical stance to the way that they operated. This alignment is seen in the literature to be important in creating a successful organisation (Burnes and Jackson, 2011). However, this perceived successful reputation also influences the ability of the organisation to change and for employees to perceive that there is a need for change, particularly if they are told that the company is successful. Furthermore, in an organisation with strong values and culture, it is also important to align the values of any change initiative with the values of the organisation to ensure success (MacIntyre, 1985; Conroy, 2010; Burnes and Jackson, 2011). This was discussed earlier in the literature review, section 2.6.1.

5.3.1 Interview findings

The perceived link between personal and organisational values was seen by most interviewees as one of the key reasons that they joined UK Mutual and continued to work there, with many of them saying that this was most important to them when they joined:

"I also think that the values of the organisation fit very well with my own personal values so there's no conflict in terms of I'm expected, required or asked to do things that I find conflict with my own values."

(Interviewee 6)

Participants related the stories of various individuals, particularly at senior levels within the organisation, who had taken pay cuts, travelled large distances to work every day or even lived away from home to enable them to work at UK Mutual. This was attributed to the desire for these individuals to work at an organisation that reflected their own values and where there was no conflict between their own ethics and the ethics of their employer. When these stories were related, the interviewees commented that it was probably only really possible for senior members of staff to do this as it wouldn't be worth it for younger members of staff. One interviewee was actually in this position themselves and explained that they felt that they were making sacrifices to work at UK Mutual but that these sacrifices were worth it as they enjoyed their job so much. The impact of this on the individual's family life was acknowledged but again was felt to be worth it due to the nature of their role. This was surprising as flexible working practices and the ability to retain a good work life balance was

frequently commented on as something that was common at UK Mutual and a reflection of the family values of the organisation. Therefore, the fact that an employee, albeit a senior one, was making sacrifices to their personal lives is in contrast to the reputation of UK Mutual. Again though, this individual referred back to the values as the reason why they had chosen to work at UK Mutual:

"I've got a great job. In fact I love my job, it's the perfect role for me that I've been aspiring towards for quite a few years and it didn't exist a couple of years ago and now it does and I'm really pleased about that."

(Interviewee 3)

This link between the personal and the organisational was seen to be important in the recruitment process to ensure that when people joined UK Mutual they could integrate into the team. For the interviewee group, the ability for people to work effectively together and fit in with the way that things are done at UK Mutual was important:

"When people join us … very quickly they sort of get it and understand and they talk in [UK Mutual] terms. That's very important."

(Interviewee 8)

Interviewees felt that suppliers also genuinely enjoyed working with UK Mutual as a result of the organisation culture and the link with their own values:

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" … a lot of our suppliers say, "oh I'm really busy but when I knew it was you I changed things around so I could do the work for you" because they genuinely like coming to work here."

(Interviewee 2)

These strong relationships lead to long service for suppliers, as well as employees at UK Mutual. McCarthy (2008) identified that those at a more senior level in organisations tended to tell stories with more consistent values (with the organisation) than other levels of employee. He argues that having and displaying values that are consistent with the organisation values is an indicator of a "stronger or more focussed organizational commitment" (p. 166). Therefore, telling more positive stories about the organisation shows that a leader is more committed to the organisation.

5.3.2   Action research group findings

5.3.2.1 Participant views at the beginning of the study

In common with the interviewees, the link between the personal and the organisational was seen as a key difference to UK Mutual in comparison to other organisations that the participants had worked in and was something that was focussed on during recruitment to ensure that new joiners were a good fit with the organisation. As Casey (1999) states, the first task of a new employee is "fitting the self into the new normative conditions of the … culture" (p. 164).

Nevertheless, the participants of the action research group provided many stories of employees either fitting in or not, and those that didn't fit in didn't last long at UK Mutual, for example:

"Some people can understand [the culture] and just fit and others just never could, it's weird isn't it?"

"… it took me definitely 18 months to really feel the place, …, how it works and certainly in our department we did have a guy come in full of energy, very different to the norm and we thought great and he joined us for 3 – 4 months and it really was just not for him. I think that was because he really wanted to progress he really felt I can go here and when he got here he thought it's going to take me a lot more time for me to progress."

(Participants, Action Research Group 1)

"[You] can spot the people that won't stay, [they] don't get stuck in."

(Participant, Action Research Group 5)

UK Mutual was described by a participant as "… a bit Marmite…" meaning that you either love it or hate it and the quote above about it taking time to really get into the organisation was shared by some of the other participants. It seems that although most of the action research group participants said that they enjoyed working at UK Mutual and felt at ease with the organisation values, this took time to develop and at the start they were unsure about whether they had made the right decision in joining the company.

The history and traditions of UK Mutual were recognised by the action research group participants as what makes the organisation different from others in the insurance sector and something that it is important that potential employees understand before they join. Talking about the organisation history is used as a means to transmit the culture and values (Maclean et al., 2014; 2018) of UK Mutual to new joiners before they discover what it is actually like to work there:

"…[when we recruit we want the candidates to work hard] … impressing us but we think you should see why you need to impress us, so here's UK Mutual from our perspective and then we talk about growth and size of the company and history and how it grew and of this great history that's gone and the greatest success it has had [to sell it to] them."

(Participant, Action Research Group 1)

"To be fair, I've been through our history with individuals who have come in for assessment, I went through it then. May as well have it, may as well see it now. May as well know why it's different [here]."

(Participant, Action Research Group 2)

This desire to explain the history and the way in which this impacts on the organisation also extends to potential suppliers to ensure that they fully understand the UK Mutual values and try to accommodate them in their own working practices:

"… so when we're looking for a supplier it is important … to actually share the story you can then see how they will react to that and definitely some suppliers are just not right for us. It just won't work. … So definitely we use the history when we're kind of working with new suppliers in particular. But they still get shocked when they become a supplier because they just think wow we didn't see it. … It's just weird how they just don't seem to…they think they understand it until they encounter it."

(Participant, Action Research Group 2)

5.3.2.2 Participant views at the end of the study

In action research group three, the participants were asked to create images using photographs to reflect how they felt about the organisation at that present moment. This was used as a way to start the discussions in the group and to provide a change of pace from the previous groups which had been purely discussion based. One participant provided an image of a number of pebbles piled together into a jar, as shown in the photograph of his images overleaf:

Fig 9:
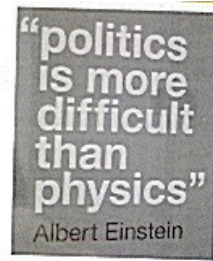
Participant images: action research group 3

He explained his choice of image thus:

"… so I have put pebbles…we're all different shapes, different sizes with all different kind of surfaces, soft, smooth… trying to work together with that, softening each other to kind of work together."

This image and his explanation were discussed at length by the group and there appeared to be broad agreement amongst them that this reflected something that they liked and embraced about the organisation. The other images that he had chosen on this sheet represent the regular opportunities to meet and eat together with his team to share ideas and also the politics that exist within the organisation. This idea though of everyone in the organisation rubbing along together and getting

on with the job was something that was returned to regularly during the action research groups.

The nature of the discussions about whether people fitted in with the organisation values or not changed over the course of the study. In the early action research groups, individuals were mentioned who briefly joined UK Mutual and then moved on as they didn't fit in. However, by the end of the study, there was concern amongst the action research group participants that new joiners to the organisation did not understand the organisation values and what constituted appropriate behaviour and that these individuals had stayed in the organisation, often at senior levels. This theme will be returned to in the next chapter where the role of outsiders coming into UK Mutual will be examined in more detail.

One participant told a story about a new manager who had joined her team recently and who she felt hadn't changed sufficiently to fit in with the pervading organisation culture and therefore were somehow breaking the chain of the culture from the past. She gave an example of his inappropriate behaviour in relation to a colleague who had asked to finish early to attend her child's sports day, making use of half a day of her annual leave. In the past, this sort of request had always been approved. On this occasion, the new manager refused the request which shocked both the employee concerned and her colleagues as this behaviour did not reflect the organisation values.

Upon hearing this story, the other action research participants also told stories from their own experiences, referring back to the days when flexitime and clocking on and off had been everyday occurrences at UK Mutual and how this had meant that there was a lot of flexibility in the way that people worked. This past experience had created an expectation of flexibility in the future and the behaviour of this new manager had run completely counter to these expectations. The participant who related the initial story told of how all good will between the team and this new manager had now been dissolved as they were so shocked at his behaviour. The new manager was seen as being too corporate and not fitting in with the way that things were done at UK Mutual and they were resented by their teams and employees.

Stories were also told about individuals in the group who had fallen foul of these behavioural norms and values and as a result had ended up being excluded from meetings. This bad behaviour would not be seen as serious in many other organisations, for example it may have been simply disagreeing with another more senior colleague in a meeting, but this was enough for the individual to be excluded from all other future similar meetings. Intriguingly, the same individual was then invited back to the meetings in the future but their exclusion or the reasons for it would never be discussed.

Within the action research group then, it appears there were clear ideas about what was appropriate and inappropriate and what it takes to fit in. These expectations were not discussed openly and I believe that this research may be the first time that

these issues have ever been discussed in UK Mutual. Certainly, the stories about

being included and excluded from meetings had never previously been discussed as

the individual concerned said that they had never talked about their experiences

before.

5.3.3 Comparison between interviews and action research group findings

There was a high level of congruence between the views of the interviewees and the

action research participants in terms of the strong link between personal and

organisational values. These were both seen as positive traits of UK Mutual as an

organisation. There was also agreement that some people didn't fit in and so left the

organisation fairly quickly after joining. As McCarthy (2008) identifies, a higher level

of agreement by employees with the organisation values leads to a more consistent

set of behaviours or responses to organisation events. This is particularly relevant

during times of uncertainty where "a more clearly understood set of value constructs

serves as a platform for common understanding which will be increasingly important

during times of turbulence" (ibid, p. 184).

The key difference between the two groups of participants was that there were

increasing concerns amongst the action research group participants by the end of the

study about the behaviours of some new joiners and their unwillingness to bend to fit

with UK Mutual's values. This was not mentioned at all by the interviewees, perhaps

due to the timescales of when the interviews took place which was over 12 months

before the start of the action research groups. In addition, the data gathered from the

interviewees suggests that they had a different perspective on the new joiners, seeing them as being key to shaking up UK Mutual and challenging the status quo:

"… I sense they argue and they disagree [at Board and Senior Management meetings], but we don't necessarily hear about it. …. But I think these people have worked outside, I think they like what we've got here, the same as I do but I think they realise that it's their job to disagree with people but that doesn't come down to the lower levels."

(Interviewee 6)

"I think we are very careful from what I have seen about the people that we employ and certainly operationally there is an ethos of trying to encourage people to share ideas, wanting to develop a culture of continuous improvement rather than it being that's the way we do things and you know, button it."

(Interviewee 4)

These interviewees are making the point that the job of some of these new joiners is to challenge and disagree and that the reasons for them doing so are more obvious to people at more senior levels. They will be party to the recruitment decisions, will be more familiar with these new joiners and will have seen their behaviour and ability to lead change as a positive attribute. But, for the action research group participants, who work at a less senior level and who will not understand the reason for the behaviour that they experience from these managers, it is confusing and upsetting when a new manager behaves in a disagreeable way.

5.4 Change history

Participants had a sense of pride to be working in a historic organisation and maintaining key aspects of this history as has already been discussed. It could be argued that in the current period of change, this history exerts an even stronger pull on employees as organisational stakeholders often nostalgically use the history and longevity of the organisation as a comfort in turbulent times (Seaman and Smith, 2012; Maclean et al., 2014). This history is a key part of the identity of long standing organisations such as UK Mutual and the people working within them. Gioia et al (2000) argue that for organisation changes to be "plausible" (p. 71) to employees, the future state of the organisation needs to be related to "… who we have been…" (ibid, p.71) not just a projection of the future.

At UK Mutual, the history of the organisation and the way it was founded has led to a number of the key characteristics of the organisation, in particular a focus on consensus, slow decision making and prudency. The reasons for these characteristics and their links to the foundation of UK Mutual have already been explored in detail earlier in the chapter. Many examples were provided during the research of how UK Mutual was slow to change, suggesting that the history of the organisation has impacted on the way in which the organisation took decisions. However, there were also discussions about change management at UK Mutual and how this was different to other organisations, for example a participant in the action research groups stated that time at UK Mutual was "… a bit like Spanish time!".

In the current change environment at UK Mutual, the speed of change has increased and there is now more change than has ever previously been experienced in the organisation's history. There are a number of catalysts that triggered the current pace of change at UK Mutual including the creation of a new management team made up of both internal and external (i.e. non UK Mutual) individuals who had a specific change agenda (Knights and McCabe, 2015). Many of these external appointments were seen by participants as having a high level of influence over the way that UK Mutual would be managed in the future. Much of the change currently being introduced is technology based, designed to make the customer experience better and enable UK Mutual to catch up with other insurance providers in the market.

5.4.1 Interview findings

For these participants, their responses in the interviews highlighted how the history of UK Mutual had had a major impact on the way that the organisation continues to operate today. For example, participants talked about how the desire for consensus can really slow down decision making:

" … collaboration and all the rest of it … means that everybody has to have their view and then we have to have another view about it so that's the real dilemma the organisation has culturally is that you have new people going "come on get on with this" and if we have got representatives that's ok, then there is the old school and I'm just sat somewhere in the middle, I think it's about the right people in the room and you have to trust us to make those decisions, not everybody can be consulted on everything."

(Interviewee 2)

Discussions during the interviews suggested that participants were aware of how change was slow to be enacted at UK Mutual. One interviewee gave an example of how change programmes are planned based on what could be achieved in UK Mutual rather than how long an activity would actually take. For example, an interviewee talked about considering what is the right/human thing to do when project planning and taking twelve months to complete an activity (to give time to allow people to take in the change and deal with it) when in reality, the activity would only take three months.

There were also numerous metaphors and analogies about UK Mutual's slowness to change that arose during the interviewees, for example likening UK Mutual to a "super tanker" and that achieving change was like trying to "…turn the Titanic." The consistency of the nautical analogies that appeared during the interviews clearly indicated that there was a familiarity with these analogies across the organisation (Waistell, 2006), particularly amongst the management workforce.

Intrigued, I decided to investigate further with my organisational insider contacts (Gioia et al., 2010) and discovered that all the managers had attended a training programme with a particular provider which focused on building their skills as leaders and visionaries. The organisation as a boat and manager as the captain analogy had extensively been used on the course, particularly in the context of setting a vision for the team using story (Marzec, 2007). It appears that the language used on this

course had really resonated with participants and had become part of their everyday vernacular, as this example shows:

"I do a kick-off with the whole of my team, sort of setting direction. And actually people say well a lot of priorities – what's your number one priority? What are we about? [What will] make the boat go faster? So we bear those two things in mind, and if we're saying what's now making our boat go faster, this is about the customer, this is about making ourselves more efficient, we aren't going to go wrong.

If you walked upstairs we've had a boat building type competition with pledges for people focusing on what their pledge is for customers, and again, so people are constantly thinking about this, what's going to make our boat go faster as something to harness things on."

(Interviewee 7)

Here it appears that the nautical words were used as a metaphor to discuss change in a way that perhaps makes it more acceptable to employees (Waistell, 2006) by talking about change in more familiar terms. This participant seemed to think that this had gone down well with their team.

The management group were in general, positive about the current changes that were taking place and pragmatic about their causes. They saw that the catalysts for change were necessary in order to remain competitive:

"New change will be focusing on what bits that we're actually going to make, carry on making ourselves where we're actually going in the business, what do customers really want. And that will mean organisational design changes, it will affect how we look and feel, what people do, what we

continue to manufacture, all of those things are in the melting pot over the next few years. So that's going to change how we operate."

(Interviewee 6)

"So that's been a big change and as a result of a lot of that work, there's been restructures right through the organisation and that didn't exist before so those two sort of things have really played out. So pretty much every area of the business has had some kind of restructure."

(Interviewee 5)

There was a strong sense from the interviewees that UK Mutual is embarking on something new. These individual's stories do seem to suggest that there is a sense of commitment by these individuals in the organisation to the change, the destination has been set and everyone has to stick with it:

"… I feel that I can still see the, whatever you want to call it, the light house, the guiding star, whatever, is still five years away and I know that that's where I'm aiming, and I know that I'm going to have to move left and right to get that but there are no huge shifts in everything you've been doing for the last three months is now completely put in the bin, start again. We seem to have that, and I think, me, the guys I recruit and work with, if you tell us where that place in five years' time is, I can get there, but if you keep changing it every three months, I'm not, but I'll try but you waste so much effort reversing what's being done previously so, I think that works very well for us."

(Interviewee 6)

There was also a strong focus on the willingness of these individuals to change and also a desire to get better at managing change. UK Mutual's approach to managing change in the past was described by one interviewee as being like "guerrilla warfare", with change roles being taken on by employees on top of their day jobs and thus taking place in secret and being hidden. The change had a clear beginning and end (McCabe, 2004), at which point these individuals would return to their normal day job. The interviewees reflected that now change was more out in the open and that the organisation was taking on change management and project management specialists to support the management of change in a more professional way. They appeared to want to distance themselves from the change practices of the past (McCabe, 2004).

5.4.2 Action research group findings

5.4.2.1 Participant views at the beginning of the study

The current environment of change at UK Mutual was explored in detail with the participants in the first action research group. There was a high level of consensus in the group that the organisation was facing a major period of change and was changing from "…the old sleepy mutual side of things [to a] more business selling element which has got better at pushing itself…". There was a recognition that the organisation was in a period of transition from one state to another:

"I think that it's changed a lot in the last 2 to 3 years since I've been here from the old fashioned way of doing things, you did it this way because...."

(Participant, Action Research Group 1)

The key changes that were discussed were how UK Mutual was now more outward looking and that employees were able to be more open with management. Change was discussed and communicated more openly and the reasons for changes were understood. These changes that had taken place were seen positively by the participants in the most part:

"I think that most people have appreciated the change and they knew it had to happen. Even the ones that have been here for a time have welcomed that now and actually they have got more chance to flourish and get their ideas forward now."

"…if I cast back to when I started 10 years ago going from that original start to now, there has been a change for the better…"

(Participants, Action Research Group 1)

However, there was a counterpoint to this view, with a participant in the first action research group highlighting how the organisation culture in the past had been very protective whereas now, employees felt more exposed. The participant said that they liked this aspect of the new culture but also suggested that this might be difficult for employees who had worked in UK Mutual for a long period of time:

"I think as well, there is definitely a different dynamic to the culture, going back to the people who have been here quite a while before new guys coming in. New guys coming in kind of know it's greener on the other side, it's not everything you want outside."

(Participant, Action Research Group 1)

The change was seen to be driven by new people joining the organisation, as highlighted in the above quote. These new joiners were able to show long standing employees that UK Mutual was actually a good place to work by sharing their experiences outside of the organisation. The changes that had been made within the senior leadership team, including a new CEO in 2008, were also emphasised as a root cause for the current change environment. Participants talked about how the energy within the organisation had changed with each new joiner at senior levels and having additional Directors within the organisation also provided more clarity of expectations for employees.

A particular story surfaced in the first action research group when I asked the group to recall a recent change that illustrated how change happened at UK Mutual. Simultaneously, two of the participants talked about when employees were no longer required to clock in and out of work (see section 5.3.2.2 for more discussion of this story). This change had taken place a few years previously but had made a big impression on the participants because of the slow way in which it had been implemented. The decision was made to pilot the new ways of working with a small group of employees and one of the participants found this intriguing, in comparison to other places where they had worked:

"…it was interesting that we had to pilot getting rid of the time clocks because … I came from an organisation that if you wanted to get something done, you just did it and then you told everybody what was happening. Then they went right, we are going to do a month's pilot of the time clock. And it's like, OK, why don't you just get rid of it? And they are like, oh well we couldn't do that because everybody would get very upset if we just did it!"

(Participant, Action Research Group 1)

In this extract, "they" refers to the management. This participant had questioned her manager about why this approach was taken to implementing a change and this was the manager's response. The participants felt that this approach was indicative of UK Mutual's cautious approach to change. There was a need for the change to be proven through a pilot which acted as a "safety blanket", showing employees that the change was safe for them. Linking also with the cultural characteristic of UK Mutual as being consensus driven, this approach would also enable enough analysis to be undertaken to make management feel comfortable that this decision was a good one (Langley, 1995).

This approach was felt to be successful for introducing change at UK Mutual, at a pace that employees felt was comfortable. Despite the participant's misgivings about this approach compared to previous employers, for UK Mutual this was the most successful way to create change. However, this slow and careful approach to change still created uncertainty for some employees:

"…there was a lot who did the pilot [who said] how dare they do this, how are we going to monitor our hours and it's just going to be chaos…"

(Participant, Action Research Group 1)

Once people had got used to the new system though, which was an online system which they logged in and out of everyday rather than a card based clocking in and out system, there were still complaints:

"..they know when you are in and when you out, they are monitoring us now…"

(Participant, Action Research Group 1)

Again, "they" are the management here. There was also distrust that the system would work properly and fear that hours would be lost which meant that some employees continued to keep their own paper records of their hours as well as using the new online system. This reluctance to accept the new way of working was identified by the participants as being about the mindset of the employees concerned rather than the specific task that they had been asked to do:

"It's the fear of change, the knee jerk reaction is no I'm not changing my way."

(Participant, Action Research Group 1)

The behaviour was seen to be driven by fear that this change was the first of many and that other employee benefits might also be changed or cut, for example flexible working. The ability to have a good work life balance was a key factor for joining UK Mutual for many employees and so the change of process was seen as the beginning perhaps of UK Mutual transitioning to becoming a very different organisation. The action research participants were mostly positive about change within UK Mutual and excited about the future possibilities for the organisation. Their stories about clocking in and out were told with frustration about the employees who couldn't accept the change, suggesting that they saw themselves as advocates for change, at least during the initial action research groups.

5.4.2.2 Participant views at the end of the study

By the end of the study, the action research participants had become slightly more negative. Whilst there was a recognition that change within organisations was a constant, there was also an understanding of the difficulties of sustaining change over time:

"…here we go again … I've been here before in one form or another but that's just life. Just because it's like this now doesn't mean I didn't like it before. … It constantly changes and that's just life isn't it?"

(Participant, Action Research Group 2)

"I don't feel as buoyant as I did last year … just trying to make it all work, the pieces on the floor and picking them all up again and making them fit together again has been really hard…"

(Participant, Action Research Group 4)

In action research group five, I asked the group to provide an image of the organisation at that moment, and this time they drew their images onto flipchart paper in order to quickly provide a snapshot of the organisation to stimulate discussion. The photograph below shows all of the pictures as they were presented during the action research group:

Fig 10:

Participant drawings, action research group 5

Here, a pebble metaphor was drawn by the participant (see Fig 11. below). He

explained that he had drawn it to signify the ripple effect of a pebble being thrown

into a pool or a stream as a metaphor for the current state of change in the

organisation. Lots of change was taking place and each change had effects, both

planned and unplanned, on the organisation. These changes could be small but the

effects were large, represented by the ripples in a pond when a pebble is thrown in.

Fig 11:
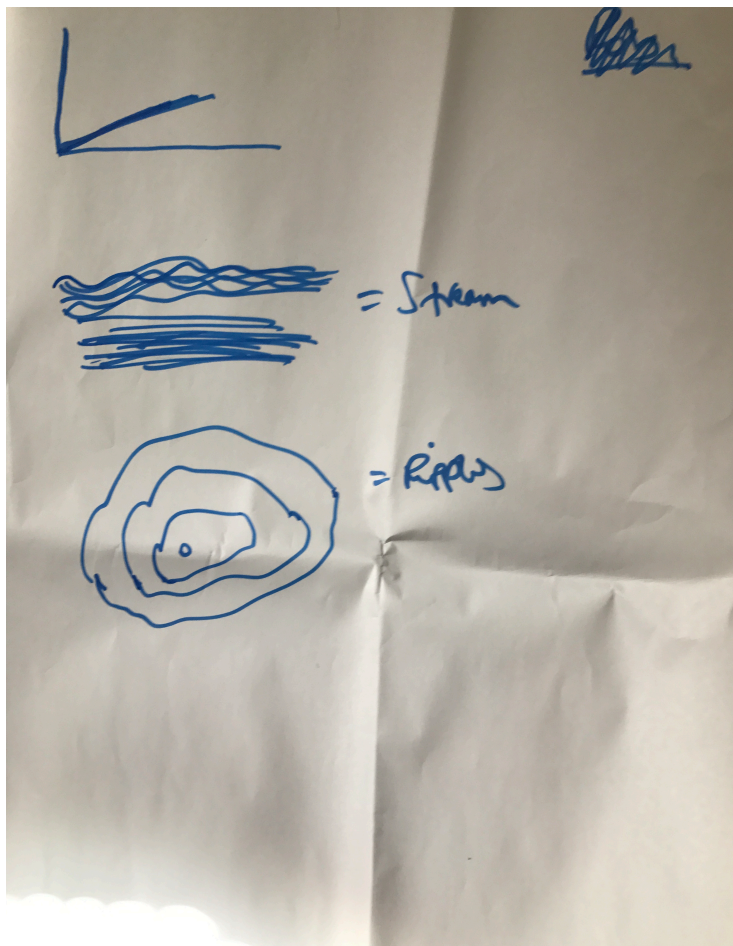
Participant drawing, action research group 5, pebble metaphor

Also shown in this picture is a stream which the participant said represented a continuous flow of change rather than the ebb and flow or waves of change that an ocean or waves might represent (see earlier in this section for similar stories from the interviewees). The participant talked about how he now found himself wondering about what change might happen next rather than in previous change programmes where there were clear start and end points. These differing images suggest a variation in the way that he was experiencing change within the organisation, from his previous experiences where there was a clear end point of change, to a situation where change was almost constant. This reflects a significant alteration to the way that change is dealt with in UK Mutual.

The use of a stream metaphor by participants experiencing change at UK Mutual is interesting as the same metaphor has been referenced by other researchers in relation to the flow of time experienced by individuals during periods of change (Purser and Petranker, 2004). The authors explain that the metaphor of change as a stream or river is a useful way of explaining the feeling of insecurity that can be created in an environment of ceaseless change. They specifically use a stream metaphor, to illustrate how the observer of change (for example, an employee at UK Mutual) feels that everything is rushing past them with nowhere safe for them to stand and observe what is happening.

Watkins et al (2011), quoting Wheatley (1994) also provide a stream metaphor as an explanation for why Appreciative Inquiry can be a useful approach to enable organisations to move towards their desired future state. They suggest how the

world should be seen as constantly changing and requiring adaptability on the part of individuals (Wheatley, 1994):

> What is it that streams can teach me about organizations? … This stream has an impressive ability to adapt, to shift the configurations, to let the power balance move, to create new structures. But driving this adaptability, making it all happen, I think, is the water's need to flow. Water answers to gravity, to downhill, to the call of the ocean. The forms change but the mission remains clear. … Streams have more than one response to rocks; otherwise there'd be no Grand Canyon. Or else Grand Canyons everywhere." (Watkins et al, 2011, p.18)

There is a similarity between this use of the stream metaphor by the participant and the use of the metaphor by Purser and Petranker (2004). For the research participant, it appears that this was a true reflection of their feelings in the moment and that the use of the metaphor gave them a powerful tool with which to explain their feelings to others, in particular their feeling of loss of control as they strove to align their wish to protect the culture and history of the organisation with the climate of change within the organisation. It may also reflect a change in the way that this participant perceived his identity as an employee of UK Mutual. Employee identity will be discussed in more detail in the next chapter.

5.4.3   Comparison between interview and action research group findings

The interviewees were very positive about the nature of change at UK Mutual at the time of their interviews and similarly, the action research group participants were also positive about the future at the start of their action research group journey. As with other aspects that emerged from the research (McCarthy, 2008), the interviewees had a high degree of visibility about the future plans for UK Mutual, due to their level of seniority, which may have meant that they felt more in control of the future.

By the end of the research process though, the action research participants had become more fatigued by the change process and more fearful of the future. This could be an indication of the prolonged period of change that they had undergone, with the knowledge that there was more to come. They also had less opportunity to influence this change and so may have felt that it was being done to them. Having the opportunity to talk about their feelings (in the action research groups) and reflect on the reality of the situation seemed to be really helpful to the group, much in the way that is suggested by others to overcome resistance to change (Kegan and Lahey, 2001; Bochman and Kroth, 2010). The recognition of their own feelings about change, that these feelings were normal and that actually the reality might not be as bad as they thought was an interesting reflection from the group towards the end of the action research groups.

This suggests that there needs to be a recognition of this within change programmes, allowing individuals to take time to reflect on their own change journey without the expectation that they will successfully 'transition' through change at the same pace

as everyone else. Indeed, the participants in this study said that they particularly valued having the time to talk about change and reflect on their views about it during the study.

5.5   Nostalgia

Organisations, and the people within them, make use of the past to interpret the past, present and future (Lawler, 2002) and to reinforce corporate values and actions (Maclean et al., 2014). The importance of the history of UK Mutual in formulating current behaviours and strategies has already been discussed in this chapter. However, during the action research groups, the participants were also very nostalgic for the past, talking about events and stories from the past with great affection.

Yiannis Gabriel, in his 1993 seminal work, explains that nostalgia exists within organisations and can be experienced by both individuals and groups within these organisations. This nostalgia is caused by individuals not wanting to forget the past as they see it as being somehow better than the present (Gabriel, 1993; McCabe, 2004). Citing Gabriel (1993), Strangleman (1999) explains that this nostalgia can cause individuals to "… cling doggedly to images of a 'golden past' during or after restructuring and corporate culture change programmes…" (p. 727).

Wolfram-Cox (2001) states that organisation change is often presented in the literature as a progressive series of steps to move from the past to the future and from which the past needs to be "banished" (p.168). In the literature, there is a sense

of distance between the past and present (Ybema, 2014) and the need to create a rupture from the past in order to create change (Foster et al., 2017). However, despite this ahistorical focus in much of the literature, other research has shown that employees can still feel a sense of loss and grief for the past, particularly if the past is viewed more positively than the present (Wolfram-Cox, 1997; 2001; Bell and Taylor, 2011). This aspect of organisation change has not been a focus in existing change literature (Bell and Taylor, 2011).

Nostalgia is not just a sense of wistfulness for the past but can also be a "…coping mechanism for discomfort…" (p.124) when employees feel a sense of injustice or inequality within the organisation environment (Sedikides and Wildschut, 2019). The authors of this article argue that when nostalgia is experienced and shared by groups within an organisation, it can act as a social glue that bonds them together (ibid). Interestingly, they also argue that these bonds can lead to rejection of individuals who are not in the group, who do not experience the nostalgia (ibid) and therefore do not belong (Strangleman, 1999). This theme of who is inside and outside of groups within UK Mutual will be returned to in the next chapter about employee identity.

5.5.1 Interview findings

Whilst there was recognition within the interview participants that it was important to maintain the essence of UK Mutual in the future, i.e. what makes it different, there was little evidence of nostalgia for the past. This is similar to other findings from research into nostalgia, which has been very focussed on employees and not

management (Strangleman, 1999). Whether this absence of findings is due to managers not experiencing nostalgia or whether the question has simply not been asked of managers is unclear. At UK Mutual, I found that the management group were very forward looking and seemed to be excited about the changes ahead:

"I think people would maybe see UK Mutual as a sleepy type of place, if you're looking at it from the outside … I've never seen that, in all my ten years here … it's already wanted to grasp change…"

"… so change is here, change is happening, well, you don't stop changing anyway you know…"

"…we're in a record year at the moment, sales are great. We're on top of all of that so life's good I say!"

(Interviewee 7)

This could be due to their seniority within UK Mutual giving them full oversight of the vision and strategy for the future. In addition, they may have been less concerned about the future of the company as they could see the opportunities that were created through change rather than what would be lost. They also would be able to see how UK Mutual needed to change to continue to compete in a competitive industry.

There was recognition that people within their teams were feeling overloaded by the changes that were taking place, but the participants were not always sympathetic about why this might be the case:

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"I think that people kept thinking that the change was going to come to an end, and I think they're still fooling themselves … that's caused a bit of discomfort … as time's gone on people have got used to it…"

(Interviewee 7)

There was acknowledgement that there had been multiple changes of direction in strategy and this was seen as the reason why this overload could have taken place. However, the interviewees often compared the degree of change at UK Mutual with other organisations that they had worked in and agreed that there was relatively little change compared with elsewhere. As Interviewee 7 said "…it's not been that kind of real turn up the heat stuff…". This ability to look outside of the organisation may also be a virtue of their seniority and enables the interviewees to have a perspective on change that their teams may not. Nonetheless, it appeared that this interviewee was attempting to negate or minimise the feelings of their teams, without taking the time to appreciate the root causes for their feelings of change fatigue and overload. Out of all the interviewees, only Interviewee 1 had a different view, stating their concern that UK Mutual was losing something important about themselves by trying to be "…slick…" and emulate other companies:

"…I worry in some ways we're getting a bit too, I suppose dazzled by the bright lights of the different things over here when actually I would rather come back to the fundamentals of really serving our customers and not the size of the car you can get and things like that."

(Interviewee 1)

In their 2015 study of a mutual insurance society, Knights and McCabe discuss how other mutuals had abandoned their mutuality to emulate the world of banking and perhaps this is what this participant feared would happen at UK Mutual (Knights and McCabe, 2015; Knights, 2019). This was an aspect of UK Mutual that had not been discussed by other interviewees who had focussed a lot on the level of customer service and how important that was. Interviewee 1 acknowledged that their views were in the minority:

"…the way I see the world isn't necessarily how a lot of other people see the world. I did actually complain when they put the bonus rates up. I said I don't think this is right. But I'm sure a lot of other people wouldn't agree."

(Interviewee 1)

This interviewee had a relatively short length of service with UK Mutual (4.5 years) so perhaps was able to see how UK Mutual was different from other insurance companies. This may have influenced their view that it was important to maintain what makes UK Mutual different: perhaps this interviewee's experiences in other companies were less positive and so made them afraid that UK Mutual would become like their previous employers. It is interesting that despite knowing that their views were different from others, this did not stop this individual from stating them. Given the degree of consensus that characterises UK Mutual, this behaviour is unusual.

In another interview, another participant talked about working with people who were difficult and who "…made a fuss…":

"I spoke to some of my colleagues who were getting angry and kicking off, and I had a word with them and said … if you were in a situation of picking us, are you going to pick somebody who is shouting and making a nuisance of themselves and complaining about the process or are you going to pick somebody who just gets on with it?"

(Interviewee 4)

Throughout the discussions of the future with the interviewees, there was a great degree of focus on just getting on with things and being forward looking. This was seen as being very positive and "making a nuisance" of yourself, by stating opposing views was not. Clearly, there are hidden rules at play here, shaping the desired behaviours which could support or hinder a manager's progress (Unerman and Jacob, 2016). It is important for individuals to understand these rules in order to be successful and at UK Mutual, to be a successful manager it is clear that you must toe the party line and be forward rather than backward facing.

5.5.2   Action research group findings

5.5.2.1 Participant views at the beginning of the study

The participants of the action research groups had a slightly different perspective, with many of them taking a nostalgic view of the organisation in the past (Wolfram-

Cox, 2001) and feeling a sense of loss or mourning (Driver, 2009; Arnaud, 2012) about some of the changes that had happened. In particular the loss of activities that made work fun such as sports facilities which had been removed to reduce costs were greatly mourned. Alongside the fear that UK Mutual would become like any other organisation, there was also sadness at things that had been lost in recent years during periods of change including organisation rituals such as the Breakfast Club. In action research group three, a participant related with nostalgia and regret how the loss of the Friday Breakfast Club was a sad reflection on the way that UK Mutual had changed. They explained that when they had joined the organisation 4 years previously, everyone had breakfast together in the office canteen at 8am on a Friday. The breakfast was well attended to the point that there were queues out of the door and was affordable for everyone at £2.60 for a full breakfast including tea and coffee.

The participant explained that it was always busy and it meant a lot to people that they got to meet with each other and get to know people from different offices and buildings on site. She said that it reflected the culture of UK Mutual at the time as there were lots of new joiners and it was a really good way to get to know people informally. Another participant agreed and told a similar story about Christmas lunches that took place, again well attended and reasonably priced so it was available to all. There was a great deal of nostalgia at this point amongst the group about how things used to be and how these rituals had been stopped. Participants felt that they had stopped as they were seen by management as not cost effective. However, the participants felt these rituals provided an important means for different

employees to connect with each other, particularly if they did not work together on a day to day basis. There was also a feeling of loss about how things had changed within UK Mutual, to become more cost focussed rather than family focussed as they had been in the past.

Another member of the group challenged the nostalgia saying that it was important to think about the economics of the situation as well as whether people enjoyed it or not. This discussion seemed to reflect again the tension between the need for change and efficiency and the desire amongst employees for UK Mutual to remain the same. As Schein (1990) has suggested, it can be extremely difficult to change an organisation culture and perhaps these small changes and reduction in organisation rituals is a reflection of the way that the culture of UK Mutual is developing (Mike, 2014).

5.5.2.2 Participant views at the end of the study

Over the period of the study, the action research group participants reflected in depth about the current culture at UK Mutual and how it had changed. In many instances, the participants discussed their fears that the organisation was departing from its roots and there being too much focus now on efficiency, as per the picture overleaf from action research group 5:

Fig 12:
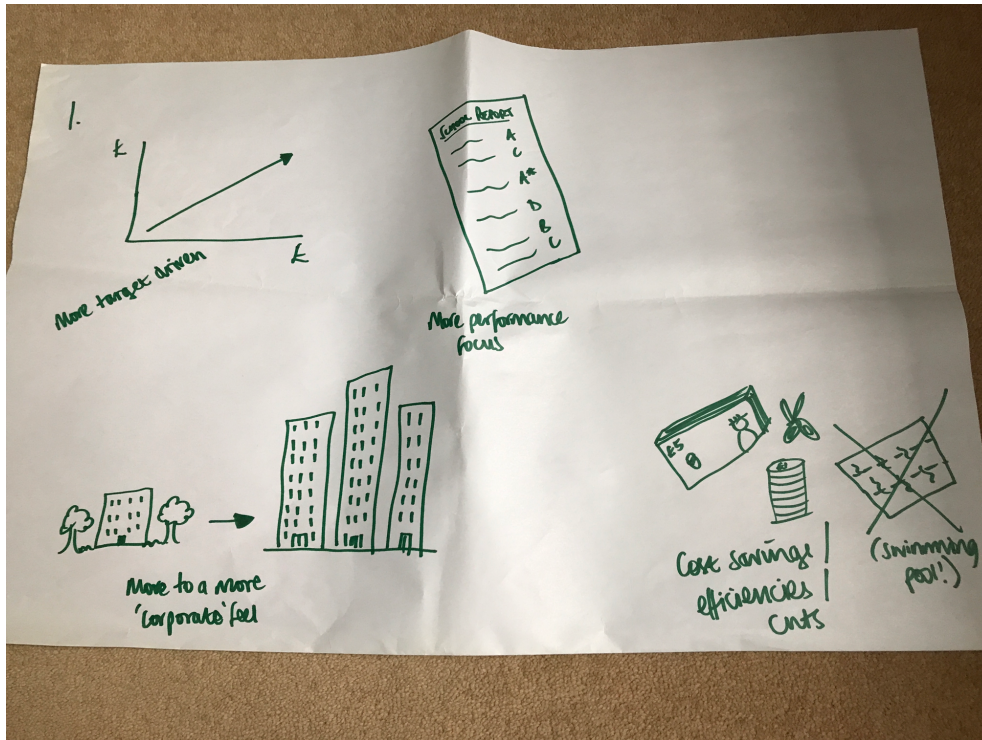
Participant drawing 1, action research group 5, the future of UK Mutual

This picture was drawn by a participant in response to the question "What does it feel like to work at UK Mutual at the moment?" and at the forefront of the drawing is a greater focus on performance, targets, cost savings and efficiencies. Also, she has shown that UK Mutual is becoming more 'corporate' in its feel. All of these aspects were seen to be negative by this participant, moving UK Mutual further away from its past and its values. This had led to this participant to fear for the future of UK Mutual and look back with nostalgia on the past.

The reference to the swimming pool in the lower right hand corner of the drawing is in recognition of the fact that the swimming pool in the head office of UK Mutual had recently been filled in and made into meeting rooms. This change took place during

the period of the action research groups so was a topic that was discussed at length. Again, the group recognised that this was an economic decision but it still felt to them like an erosion of the past. The pool had been symbolic of the culture of UK Mutual as a special place to work that invested in its employees and with its demise, employees felt that these values were being lost (Corley and Gioia, 2004; Driver, 2009):

"And when you joined you saw you got flexi time, you got a pool, you got so many benefits, the office environment is brilliant and that just didn't exist elsewhere …you felt special"

Participant, Action Research Group 1

Despite most of the participants not being regular users of the pool, there was still a sense of loss that something special had been replaced by something as mundane as meeting rooms.

In the same action research group and in response to the same question, another participant drew the image overleaf:

Fig 13:
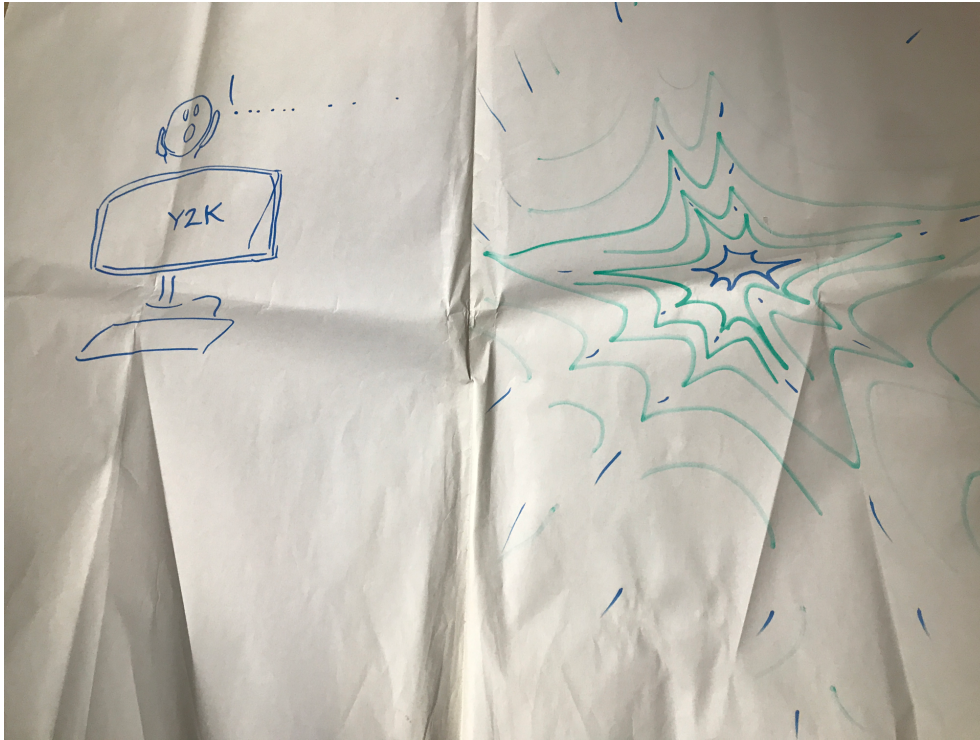
Participant drawing 2, action research group 5, the future of UK Mutual

They explained that this image represents the fear of employees about change and likened this to how fearful people were before the year 2000 and the impact of Y2K on computer systems. There was a huge amount of fear that there would be a "big bang" of change at that time, that planes would fall out of the sky and computer systems would stop working. However, in reality that didn't happen and life carried on as usual. In relation to UK Mutual, the participant said that there was a huge amount of fear that the current programme of change would lead to "…the end of [UK Mutual]", that the current changes were building to a big bang of change soon and that the bringing in of third parties to work on the change was a symptom of this. However, on reflection and in discussion with the rest of the group they also

recognised that perhaps the changes would enable the organisation to continue and in fact get better:

"Is it just normal to be afraid of change? But do we need to be this way? …we will be a more modern version of UK Mutual. In 20 years time, we will still be here being a better version of ourselves. Do we really need to fear as much as we do?"

(Participant, Action Research Group 5)

5.5.3   Comparison between interview and action research group findings

As seen in the discussion above, there were significant differences between the views of the interviewees and the action research group participants in relation to their level of nostalgia for the past. The interviewees, with one notable exception, were very forward looking and excited about the future whilst the action research groups felt sadness about what had been lost. This could be due to a number of factors.

Firstly, the discussions with the action research group took place over a longer period of time which enabled more in depth discussions about changes in the organisation. These longer term discussions also enabled me to build more of a relationship with the participants which encouraged them to be more open with me. In addition, this time period was also a time of change in the organisation, for example the removal of the swimming pool, which may have created a more nostalgic atmosphere in the group as they reflected on what they had lost.

Secondly, the interviewees were likely to be more involved in setting strategy so may have had greater visibility of the future plans for UK Mutual, meaning that they understood them in greater detail. This level of understanding also meant that they had the chance to consider the opportunities that would arise from this strategy, rather than being focussed on the past (Knights and McCabe, 2015; Knights, 2019). Their roles meant that they were responsible for communicating the strategy to their teams meaning that they had potentially had to tell the story of the strategy in a positive way to 'sell' it to their staff. Over time, this story could have been told so many times that they believed it themselves, meaning that they had a more positive perspective on change generally.

Finally, the action research groups may have had more opportunities to participate in some of the activities that they felt nostalgic about, for example the Breakfast Club and the sporting facilities such as the swimming pool. As leaders, the interviewees may not have had the time to take part in these activities or they simply may not have been invited to join in.

5.6   Conclusion

The analysis indicated that at UK Mutual, the history, culture and values of the organisation exerted a strong influence on both managers and employees and also on the ability to effect change within the organisation. There was a strong need within both groups to protect the organisation culture from changing and becoming

like any other insurance company. There was also a strong identification with the company values in comparison to the values of the participants and nostalgia for the past. There was a suggestion by the interviewees that it was difficult to introduce change in an organisation like UK Mutual as there were few outside influences such as shareholders and the City. Taken together, this suggests that UK Mutual is an organisation where change is hard to introduce and sustain.

In addition to a theme relating to organisation history, culture and values, the theme of employee identity during change was also a feature of many of the interactions with the participants. This theme will be examined in the next chapter.

6 Findings and Discussion – Employee identity

"I think it was about April/May we had [the CEO along to do a communication session]. Of course you get the whole … everyone must submit two questions. It's always targeted at certain people and I got the nod and a few other people did, …. And there's questions ready and I'd written some stuff down as well and I'll let some other people ask. Boss turns round and goes, … what's your question? So I was like oh great!

It was just…interesting we had two or three [people] refuse to go as well. [B]ecause they were a pre-[CEO] era, they were long term servers and they don't agree to the changes. So they were expressing their disgust by not going.   So [CEO] is going oh my god…there's somebody missing! *(Sarcastic voice by participant)*

[T]hese are the terrorists. They are incredibly loyal to UK Mutual, as they understood UK Mutual to be, not as it is now, even though it's kind of still the same place, same people all the rest of it, anything to do with him [the CEO] they have nothing to do with. As I pointed out to two of them the only reason you are here is because he gave us the money to expand this department, you would not be here if it wasn't for him. Doesn't matter, he gets a million pounds, I don't agree with that. Oh really. It's as petty as that. The guy before didn't do too badly either! No exactly right, that's what I said. Real disgust with him as well. So … I said, do you not want to come and ask him something? No, nothing to do with him. He must dread those things because he must never know what he's going to get. You should see the IT warrior, it's like the oldest dude bless him, he's about 70. He's typing with one hand and here he is, moaning all the time … and then he goes [CEO], what are you going to do about and gave him a list of IT snags. Just like dude, what are you doing? To be fair he completely dealt with it, he does he's really good actually. He can answer a question without answering the question. Yeah, but he does it very well and he can talk for ten minutes on one answer if he wants to just to fill the time."

6.1 Introduction

The above story was told by a participant in Action Research Group 2 in response to a question about how they saw themselves in relation to other employees in their Department. Hay, Parker and Luksyte (2020) define identity as "the central and continuous characteristics of an entity" (p. 5). They explain that sensemaking in relation to identity is a key element of change as change entails a change to identity (ibid). Therefore, "in the face of uncertainty and complexity, employees try to regain control, predictability and positive meaning in their work by crafting a clear and coherent narrative of the change, by actively making sense of what the change means" (ibid, p.5). This means, however, that there may be multiple readings of the same change, depending on the individuals involved, as illustrated in the story at the start of this chapter and will be returned to in later sections.

Outside of the context of organisation change, identity has been defined as "… how a person can be defined by characteristics such as physical properties, practices and relationships that they share with others and those characteristics that make them different from others" (Anderson and Gold, 2009, p. 230). These specific attributes become part of the way in which a person views themselves and the way in which they want other people to view them (ibid). This view of the self then is created by the individual but is also influenced by outside factors such as culture and society (Anderson and Gold, 2009).

Employee identity is important in the study of organisations, particularly in a change context and is becoming of greater prominence. A recent article in the Harvard

Business Review highlighted how leaders in organisations who wish to increase employee acceptance of change needed to emphasise the elements of employee identity which would remain constant in the future (Venus, Stam and van Knippenberg, 2018). Lok and Wilmott (2014) also discovered that maintaining "our thing", (p. 218) i.e. what makes an organisation different, was a key aspect of creating and keeping employee identities during periods of change.

Within a single organisation, there will be many different employee identities and cultural groups (Stanford, 2010; 2019) and it is this which can make employee identity a difficult area to study. Stanford (ibid) presents a useful analogy to assist with understanding of the topic: she uses a weather vs climate analogy. She argues that there will be an organisation culture and identity that operates across the whole organisation and this can be compared to climate. This can be understood, labelled and talked about at an organisation level (ibid). This climate will also assist with sensemaking and enabling employees to understand what types of behaviours are acceptable within the organisation. Meanwhile, there are also local identities and cultures within specific teams and individuals and this can be compared to the weather in a particular location (ibid). There may be many of these within an organisation and even within specific teams (ibid). Again, these will determine acceptable behaviours but these will be limited to a very specific group of people. These identities are created by individuals and groups based on how they see themselves in relation to others (Anderson and Gold, 2009; Bailey et al., 2019) and the stories that they tell about this (Lawler, 2002).

In this chapter, I will discuss three aspects of identity that emerged from the analysis, namely change resistance, fear of management and outsiders and employee identity. Each of these will be discussed in detail and compared with existing relevant literature and also any changes in participant views will be tracked throughout the duration of the study. Using Stanford's (2010, 2019) analogy again, there will be links between the organisation climate and the weather within individual teams throughout. Some of the themes will relate to specific groups of individuals whilst others will be more far reaching and will be experienced by wider groups of employees.

The attributes of the UK Mutual culture have already been discussed in earlier chapters and these will influence the way that employees view their identity. Some of this influence is very positive, in that UK Mutual is a values led organisation with a strong drive for ethical behaviour and links to personal values. Many participants identified strongly with the mutual aspect of UK Mutual. They saw this as a key aspect of their identity as an employee. However, there was a dark side to this aspect of employee identity, and one that emerged particularly in the study is the phenomenon of employees becoming "mutualised".

Mutualisation was defined as when an employee had been in the organisation for so long that they began to be "tainted" (this was the exact word used by the participants) by the culture to the extent that it impacted adversely on their performance. These individuals were seen to identify strongly with key aspects of the UK Mutual culture and used these to guide their behaviour. For example, by being fixated on

bureaucracy, forms and process; doing just enough to get the job done and no more; focusing on hierarchy and perceiving management as a threat. This, along with their perceived resistance to change will be examined in detail in this chapter.

On the whole, the interviewees focused mainly on the positive impact that UK Mutual's status as a mutual had, particularly on financial performance:

"We are a mutual so we don't have shareholders to worry about and therefore our cost base is engineered so that we can pay claims. And I think that is an ethical thing to do, if you pay for your insurance you want to know when you need it you've got it.

… we are a cash rich organisation because we have to keep so much in reserve because we don't have shareholders so we can't sell more shares to create capital, because we are capital rich [it is difficult to create] burning platforms …, so the driver for change has to be self-taught and self-owned as opposed to actually it's not the shareholders, it's not the City, it's not any of that and that's actually sometimes, it's too comfortable and too complacent so people don't buy into it so why do we have to change? Well if we don't change we'll be out of business. It doesn't matter if you're 103 or 3 years old it does not matter. The world we live in is very different.

(Interviewee 2)

There are two interesting points in this quote. The first is the view of this individual (echoed by other interviewees) that the fact that the mutual doesn't have shareholders to worry about is one of the keys to its success, both in relation to financial performance but also in the ability to pay customer's claims. Previous research (O'Sullivan and Diacon, 1999; Valnek, 1999; Letza, Hardwick and Kowalski,

2001; Grijpstra et al., 2011), has supported this view, as was discussed in the initial description of UK Mutual in the introduction.

The second point of interest in this quote is the realisation by the interviewee that the mutual status can also lead to problems with effecting change. Here, the interviewee is noting that this is the case and also that the need for change must be driven internally rather than from external pressures such as shareholders. This really highlights the difficulties that UK Mutual faces in responding to the changing business environment and explains their reliance on external parties such as consultants and external hires as a means to drive change. The role of the consultant and the impact that their presence at UK Mutual has on employee identity, will be examined later in this chapter.

This chapter is presented slightly differently to the previous findings and discussion chapter, as identity was a concept that emerged from the action research groups rather than the interviews. Therefore, in this chapter the findings from the action group are presented and then a comparison is used to show how the views of the participants changed over the duration of the study. Where relevant, comments from the interviews are included to provide more detail or to act as a contrast to the views of the participants.

6.2 Change resistance

There have been a number of academic studies of change resistance, although in the management literature, resistance is often typified as the actions of a few 'difficult' individuals . Harding, Ford and Lee (2017) provide a useful summary of the forms of change resistance emerging from existing empirical studies, highlighting that it can be active (such as striking) or more passive such as "questioning decisions or withholding consent" (p.1211). This passive resistance is typified in the quote at the start of this chapter. Resistance may also be organised as a group activity or unorganised and practised by an individual (ibid). There are many acts which could be defined as resistance, ranging from those that could disrupt business as usual such as striking to individual acts of scepticism about the future direction of an organisation.

Resistance to change is often presented in the literature as "…a counterproductive irritant for mainstream management thought…" (Mumby et al 2017, p. 1161) or an irrational behaviour (Sturdy and Grey, 2003). However, Mumby et al (2017) argue that, far from being irrational, resistance is actually a necessary and constructive response to specific organisational contexts. In particular, where one group within the organisation has power and dominance over another (ibid). Therefore, resistance to change is contextual and situational and what counts as resistance in one situation will not be in another (ibid). Based on a review of existing literature in the field, Mumby et al (2017) concluded that there are four types of resistance, with their category of "individual infrapolitics" (p.1163) being similar to Ybema and Horvers' (2014) categorisation of small acts of resistance as "micro resistance'

(p.165). In both cases, these small, covert actions of resistance can still lead to delays in introducing organisation change.

Sturdy and Grey (2003) highlight how the identity of the change resister is characterised as being a tragic character whilst the change agent or change maker is the hero of the piece. There is an assumption in some research that individual resistance to change is due to the personal characteristics of the employees (Vos and Rupert, 2018). There may also be other reasons for resistance such as "lack of motivation, uncertainties and the increased anxiety that change brings" (ibid, p.453) or "a lack of conviction that the change is needed" (ibid, p. 454). Whatever the reasons for the behaviour, change resistance is seen as a response to a change which does not fit with what a change agent or leader is trying to achieve. Vos and Rupert (2018) argue that this resistance may be in the eye of the beholder and their interpretation of an individual's behaviour. "When a change does not progress as expected, the change agent may blame the situation on others … to make themselves look better" (ibid, p. 455).

Change resistance emerged from the action research groups as being present in the actions of specific groups of employees, named by the participants as 'organisation terrorists' (It is worth noting here that once the term organisation terrorist had been mentioned by one participant, it caught on within the group and subsequently was a topic that was discussed at length in a number of the action research groups.) Change resistance was also discussed in relation to employees who had been seen as being 'mutualised'. It may be that some employees of UK Mutual were both

organisation terrorists and mutualised, in fact this seems likely. However, given that the individuals discussed were never named, it is impossible to say. The participants saw themselves (certainly at the start of the study) as being separate and not included in change resistant activities.

The change resistance activities undertaken by these individuals was not seen as being overt, such as defying instructions (Hawkins, 2008) or going on strike (Fronda and Moriceau, 2008). Rather, they resisted change by not engaging in certain aspects of work, for example by not completing the employee engagement survey or not attending communication events held by senior management (see the story quoted at the start of the chapter).   Fronda and Moriceau (2008) suggest that this more "discreet' (p. 591) form of resistance is "… the classic situation of the go-slow. This is not explicit resistance (as in conventional revolts or strikes) or a mental pulling-out from the professional sphere (as in withdrawal), but a form of deviance (Alter, 2000; Becker, 1966; Ybema, 2014) which complies with the letter of the law but discreetly resists its spirit. One "goes through the motions … the everyday games of the players who discreetly resist, without proclaiming it loud and clear." (Fronda and Moriceau, 2008, p.591).

This "hidden" (ibid, p.604) resistance is as a result of employees feeling that a change is being imposed upon them which they have not agreed to and which they do not understand the purpose of. If asked, many of these employees would say that they agreed with the change, but in private, they are resistant (Ybema and Horvers, 2017). The authors define this difference as "… back and front stage resistance…"

(ibid, p.1234), where an individual is compliant in public (front stage) but resistant in private (back stage). This was typical of the change resistance identified at UK Mutual.

Employees may also feel that their identity at work is threatened by the change, which can cause their behaviour to change in response (Harding, Ford and Lee, 2017). The authors, in their article outlining their performative theory of resistance, highlight how the failure of this identity to be recognised is what leads to change resistance acts: that an individual simply refuses not to be recognised. These resistant acts may be very short lived or transitory but will result in an employee turning away from the organisation in which they work (ibid).

6.2.1 Participant views at the beginning of the study

At the start of the research, the participants were extremely critical of some long standing employees within the organisation who one participant described as "organisation terrorists":

"… they were long term servers and they don't agree to the changes … they don't do the engagement survey and they don't do all the other initiatives [we have] got. These are the terrorists! They are incredibly loyal to UK Mutual, as they understood UK Mutual to be, not as it is now, even though it's kind of still the same place, same people all the rest of it, anything to do with management they have nothing to do with. Just not going to [attend meetings] and then they'll know how angry they are!"

(Participant, Action Research Group 2)

These individuals were seen as trying to frustrate the change process by not engaging with it (Ybema and Horvers, 2017). The participants felt that these employees wanted to signal their displeasure to senior managers by not engaging in change activities. This attitude led to extreme tension between these employees and others who were more willing to accept change, usually perceived as employees with a shorter tenure of service. There were frustrations within the group, as many of them were relative new joiners, at having to deal with these individuals:

"And they just don't get it, you have got people who have been here 30 years and they will sit and they will moan and complain…go and work somewhere else!"

(Participant, Action Research Group 1)

"And then what you get is you get terrorists in your [team] and I've got several of them who I know will push more and more and more, just because they are disenchanted with the fact for five years we've been telling them to do it and you can't do anything about that!"

(Participant, Action Research Group 2)

The action research group participants all had tales to tell about employees who had been mutualised but certainly did not identify themselves with this group in any way. The idea of long serving employees becoming mutualised was of particular interest to participants in relation to the ability to bring change about. The characteristics of someone who had been mutualised in relation to change were felt to be an

unwillingness to change and adapt (Wackernagel Bach, 2005), lack of experience outside of UK Mutual and a general sense of dissatisfaction. These employees were not named and were not identified but were grouped together as 'other' to the participants based on these characteristics. As Wackernagel Bach (2005) highlights, "… narrators … frequently cast [others] as nameless, faceless individuals intent on blocking advancement…" (p.260).

Employees who had been mutualised did not take direct action such as actively disobeying management, rather they complained to their colleagues and were seen as being stuck in the past:

"The old school will keep doing a great job of what they are doing but they are a single track and don't seem to be able to deviate to left or the right and we are about to change the way we do [things] so all hell is going to break loose from the [old school] and there is going to be an absolute…their lives are going to be ruined, I can just hear the phone ringing now saying what have you done to me and all this sort of stuff! Like what have you done to me and it's like really, think about what we have done for you, because [everyone else is] ready to go and … they are happy."

Participant, Action Research Group 1

One participant told a story about how he had been involved in a project to refurbish their office building 2 or 3 years previously, which he had really enjoyed and which had been a success, but he still had people coming up to him and telling them that he had done things wrong, for example not being satisfied with the size of their desk or

the type of chair that they had been given. This frustrated the participant as the employees who were complaining hadn't volunteered to take part in the project but:

"… they didn't even want my job, just [wanted to] whinge about it for a few minutes, … and that is one of things that really irritates me about the organisation. Well to paraphrase it just like well shut up and fix it yourself type of thing [rather than moan at me] and that is mutualism …."

(Participant, Action Research Group 1)

This impact of mutualisation was also seen to impact on relationships with suppliers. For example, a participant who worked in procurement gave examples of how suppliers were expected to fit with the UK Mutual culture and that assessing this fit was a key part of the procurement process:

"They became mutualised because they just weren't challenged, this is nice, we're making a nice profit. As much as our customers tend to stick to us we tend to stick to our customers too. Absolutely. The loyalty thing we expect and give in return. As a values led company we factor in other things that other companies…[might not] … So when the poo is hitting the fan and you've got to make savings, … I've not had to do that here; the price has never been the primary aim of choosing a supplier."

(Participant, Action Research Group 2)

Using factors such as shared values and culture in procurement was seen to bring about relationships which were very positive both for UK Mutual and for the supplier. However, the same participant also identified that there is another outcome of this

approach, which in the past has relied strongly on relationship building rather than competitive retendering:

"They have been all very nice, very friendly, we can do this for you and we've gone yes. It's only come to our radar because [we are trying to get more control over spend]. But because in the past it's just been little pockets, I think for [some suppliers] it was just very clever and…exploited us…almost exploited us. So that kind of supplier I believe they knew what we were like. I just think they were very clever in which they do that and because no one was taking overall control of it they got away with it. But now we're quite reliant on them and they know that too. But yeah, we just did not have control over what they were doing and it was very clever."

Whilst more up to date and robust procurement practices have been introduced in recent years, the culture and ways of working at UK Mutual has led to poor behaviour to the point of exploitation from some suppliers in the view of this participant. Another participant told a story about how some suppliers had realised that they could exploit this lack of control by selling one product to UK Mutual and then approaching a different part of UK Mutual to sell something else until in the end after two to three years, UK Mutual was very reliant on one particular supplier and the supplier took advantage of this by raising prices. This participant felt that the way that UK Mutual operated was well known to this supplier and the sales people at the supplier were told to deliberately use the way that UK Mutual operated to their advantage. When reflecting on this story, many participants said that they felt that this would be less likely to happen now but that the cultural aspects of suppliers, such as their customer service and values, would still be given more status during procurement than price in many cases.

6.2.2 Participant views at the end of the study

Interestingly, by the end of the research, whilst the group were still scornful of the efforts of the organisation terrorists to disrupt change, there was more sympathy for their motives as the participants started to move towards taking a more protective stance about maintaining the uniqueness of UK Mutual during the changes:

"I think the challenge to change … and the change of culture very much is not throw the baby out with the bath water."

(Participant, Action Research Group 5)

As already discussed in chapter 5, the strength of the culture featured very strongly in the stories of all the participants and they wished to try and protect it as much as possible. There may also be other factors at work driving the behaviour of the organisation terrorists. Existing research suggests that some people are personally immune to change based on their need to protect themselves and their levels of anxiety (Kegan and Lahey, 2001; Bochman and Kroth, 2010). When these individuals feel threatened or that the balance of their existence is being compromised, they may react consciously and unconsciously to move away from the change and this can be perceived by others as being resistant to change (ibid). The authors suggest that in order to achieve change, individuals need to be taught to perceive their own immunity to change and then develop methods to overcome their own assumptions which create barriers to change (ibid).

It may be true that the organisation terrorists are individuals who have a different level of immunity to change than others in the organisation, for example the participants in the study, and this leads them to behave in particular ways. At UK Mutual, the examples given were of resistance to change and vocalising negative views. Kegan and Lahey (2001) suggest that if interventions are put in place, for example development programmes designed to uncover some of these deep seated assumptions that underpin change immunity, then change may be more successful. They also caution that individuals can only change as much as they are able and so it may not be possible for every employee in an organisation to achieve the 'required' level of change.

Rafferty and Restuborg (2017) argue that the change management experiences of employees and groups can impact on their perceptions of change. If groups have very negative perceptions of previous changes, this can be detrimental to future change efforts as they "will appraise change as reducing challenge and increasing harm" (ibid, p. 543). Interestingly in relation to UK Mutual, Rafferty and Restuborg's (2017) showed that longer serving employees had more negative views about change and became more negative over time.

Similarly, Hay, Parker and Luksyte (2020) state that often change agents assume that all employees have the same view or understanding of change. However, employees who view a change as negative or a failure are far less likely to participate in the change (ibid). They may also share their views with their colleagues and this

can influence their colleague's behaviour too. Hay, Parker and Luksyte (2020) identify that at the same time, other employees such as change agents, will be very positive about the change. These different views can exist in the same organisation at the same time (ibid).

The view of the participants about their own mutualisation changed during the study. Participants began to feel that their behaviour had been directly influenced by their time working at UK Mutual, i.e. that they too had been mutualised. One participant in the final action research group said that he felt that he had thought more about what was the right thing to do in all areas of this life, that he had become more ethical and had really changed the way he lived his life as a result of working at UK Mutual. He saw this as a positive thing but also reflected that perhaps he too had been mutualised.   There was also a recognition of the reasons why employees who were seen as being mutualised might behave in the way that they did:

"… It's like in retail you talk about the customer threshold and you talk about how to delight your customer as the threshold goes up and time goes on because what you used to do that satisfied them, then becomes accepted as the norm, so what are you going to do next to delight? It's tricky to keep up with that curve I guess. And I guess people who have been here a long time have had a lot of that experience, of it being a really nice place to work, so their expectations have been raised and actually maybe now stuff is a little less comfortable as it was 10 / 15 years ago."

(Participant, Action Research Group 6)

Therefore, it could be that the behaviours of the mutualised employee are an indication of change fatigue. Certainly, my experience of undertaking the research at UK Mutual showed that there was a lot of talk about change during the period of the study and so perhaps employees were beginning to tire of hearing about the next change initiative that was going to be introduced.

The interviewees tended to view mutuality as a benefit as they perceived that it enabled UK Mutual to operate in an ethical way which sets it apart from other organisations within the insurance sector. This view could be due to the more strategic nature of their roles meaning that they could more easily see and understand the macro environment within which UK Mutual has to operate. This group did however understand the difficulties in creating change within UK Mutual, which they attributed to the lack of impact and push towards change from external forces such as shareholders and other financial institutions as already discussed. This has enabled UK Mutual to operate almost in isolation of market forces until very recently and so it can be difficult to convince employees that there is a burning platform to change, particularly when financially, UK Mutual is performing well.

Mutualisation was not discussed by the management group which suggests that either the interviewees were not aware of these or perhaps did not feel that they needed to be discussed in the interview situation. Or perhaps I hadn't asked them the right question? Interestingly, the action research participants also seemed to see the employees who resisted change as being somehow different from themselves, although they did begin to show more understanding of their views by the end of the study. Ybema and Horvers (2014) highlight that when change resistance is studied,

it is often reported as happening to employees other than the research participants. It is difficult to get participants to admit to resisting change themselves. This is interesting to reflect upon and perhaps is due to change resistance being seen as an irritating behaviour (Mumby et al., 2017) and not something to admit to.

6.3   Fear of management

The fear of management was a topic that was returned to regularly throughout the research process and as a result, this became one of the key themes of the action research groups. The participants characterised their fear as being driven by the underlying subtle, hidden politics at UK Mutual. The hierarchical and bureaucratic nature of the organisation was also a contributing factor as well as a fear of doing or saying the wrong thing. Participants talked about a fear of retribution, which although usually unfounded, was backed up by stories of exclusion from meetings, as discussed in section 5.3.2.2. In addition to these factors, the nature of management was also characterised as being parental and protective and this may account for the fear of punishment by the employees.

In common with many other organisations, UK Mutual tends to take a top down approach to communication, which is a managed and controlled process (Reitz and Higgins, 2019). As Reitz and Higgins (2019) explain, in organisations such as this, the management have the agency and power and the employees have a relatively submissive role in the communications process (Sturdy and Grey, 2003; Fronda and Moriceau, 2008). They highlight the use of management cascades of information in

such organisations and this is a technique that is used in UK Mutual and referred to by the participants in the section below. Reitz and Higgins (2019) also provide case studies that illustrate how despite the communication structures that are put in place, in many organisations employees are too afraid to voice their views, despite feeling that they are of value.   Again, this was a common thread of the discussions in the action research groups.

Similarly, not speaking up was discussed by the interviewees in relation to toeing the line of the corporate culture and values (see section 5.3.3 for earlier discussion of this topic). Using the Reitz and Higgins (2019) model, these examples suggest that the perceived culture of UK Mutual, by the action research group participants, is of a Directive "Lion" (p.31) culture with the leadership of the organisation concentrated at the top with a single individual who it would be dangerous to challenge. This is similar to the masters of the universe approach to leadership that was identified by Knights and McCabe (2015) in their case study of Proctor and Gamble. Here, all control, leadership and vision to steer the organisation through change resided at the top of the organisation (Knights, 2019).

It's important to consider why the participants have chosen to represent the leaders and culture of UK Mutual in this way. Sims (2005) argues that such stories are told for a variety of reasons, one of which may be to demonize others. He continues that this demonization may be because the storyteller simply cannot find another reason for the behaviour of the other party (ibid). It is as if there is no other story that makes sense (Sims, 2005). This form of story then is a form of sensemaking for the

individual (Sims, 2005; Weick, 2009). Given the discussions about nostalgia and change history in chapter 5, and the feelings of betrayal by the participants that are discussed in this section, perhaps this is the reason for the demonization of leadership in this case. Sims (2005) suggests that strong emotions can be created by individuals when there is a lack of coherence in how someone presents themselves and their story. Therefore, the lack of coherence between the historical story of UK Mutual as an organisation that cares for its employees and its customers (Seaman and Smith, 2012); and the current environment of change, fear and loss could provoke these strong feelings towards leadership by the research participants (Driver, 2009; Harding, Ford and Lee, 2017). The demonization story may also help to create a sense of unity with other employees, creating a them and us mentality (Sims, 2005).

An area not considered in this study is the effectiveness of the UK Mutual leadership style to its current change context (Hawkins and Dulewicz, 2009). Certainly, by many measures UK Mutual is a 'successful' organisation: it is profitable, it has high levels of customer and employee retention and satisfaction. However, it remains to be seen whether the current leadership style and approach is going to be what is required to enable UK Mutual to adapt to meet the increasing demands of the UK insurance market.

6.3.1 Participant views at the beginning of the study

Historically, the organisation has been hierarchical and formal, despite recent attempts to remove some levels of formality, for example the wearing of ties in the office. One participant discussed this move in Action Research Group 4 and said that:

"The culture is becoming less formal … the CEO said that we don't need to have ties anymore but I still feel like he is wearing a tie even when he isn't as he has a big impact… like a headmaster."

It appears that there is still an air of formality in the workplace and that the approach of the CEO and other senior Directors led to some participants feeling like a child at school. Gabriel discusses how employees can feel when they meet senior figures from their organisation and suggest that there are a number of narratives that underpin these relationships which can lead to fantasies about the leader (Gabriel, 1997). One of these fantasies is that of the leader as father figure, who inflicts punishment and elicits fear whilst at the same time dispensing rewards and eliciting loyalty (Gabriel, 1997).

Participants highlighted the degree of fear of retribution that was felt by employees particular around the introduction of new technology such as performance management systems or time recording systems. Many of these fears were baseless:

"It's strange because at no point is that, you know, if you don't hit that target then you will be punished, from day 1 there has never been any of that yet the first reaction was oh they are checking up on us! And no one has ever said that but it's just that assumption that top floor management are here to just be on us and beat us with a stick and it's a very bizarre – I don't know where it comes from. It's a bit parent child isn't it?"

(Participant, Action Research Group 1)

This fear that stems from past experiences of management which bear no resemblance to how things are today can exert a powerful force over employees and can influence their experiences of the present (McCabe, 2004). It may be that all vestiges of this past culture have not yet disappeared or that employees are having difficulties in forgetting difficult experiences in the past. They can feel overwhelmed by the past (McCabe, 2004) and may need support in overcoming it. One participant said that they felt that they were "..ambushed and assaulted.." by change in that they were not prepared for it and that it reminded them of negative experiences in the past. The tendency to hide information and protect employees was also discussed in relation to communications:

"… I think … there are so many good things here but I think the worst we have is communication or the lack and so unfortunately it's left to yourself and your colleagues to think they are going to do this, going to do that and then no one else is coming out and saying you are wrong, we are doing this because we think you are an adult and we don't want to do this anymore we want to treat you like an adult and this is why we are doing it. If we bring in a new system this is why we are doing it."

(Participant, Action Research Group 3)

An example was also given of bad news in relation to redundancies being delivered in the style of "… a shipping forecast…" with no opportunities for questions or interaction with the managers delivering the news. The reasons for this were discussed and it was suggested that perhaps managers were scared of reactions from the participants and so attempted to deliver the news as quickly as possible and without deviating from a script. This experience left the participants feeling let down by their leaders. They felt they were treated as children and not trusted with key information which led to rumours and gossip and ultimately, fear about the likely intentions and consequences of change:

"… I guess the hidden part of it is that there are things going on, say it's around the performance issues that you are not aware of and similarly … what is the actual objective of a project, that kind of hidden agenda. In both cases I often do get a feeling that there is thinking going on in the background …that doesn't get communicated very openly and I'm not sure why that is. ….. I think as long as it was communicated it could be a harsh message, but as long as it was communicated in the right way it was actually more appreciated."

(Participant, Action Research Group 3)

6.3.2 Participant views at the end of the study

"I think sometimes we try and keep everyone happy too much. We don't just accept that sometimes something has got to be done. As long as you explain it and communicate it clearly no one is going to be happy but this is what has to be done and people then have to deal with that and we end up sort of fudging things sometimes and we end up in a far worse situation. …. we start out with an idea and it's

like right that doesn't work for me or that doesn't work for me and we end up completely away from what we wanted to do in the first place."

(Participant, Action Research Group 4)

As the action research groups moved on, there were more discussions about how fear of management had changed to a feeling of disappointment in management. The participants perceived a desire amongst some managers to protect employees from bad news by not telling them the truth. But the strong message from the participants was that they would rather be treated as adults and information to be shared with them for them to make up their own minds. Given the links that participants felt between their own values and those of the organisation, it is interesting to consider whether one of the factors that led to them joining the organisation, its family feel, is also one of the factors that leads to frustration during times of change (Wolfram-Cox, 2001). Gabriel (1997) agrees that lack of communication during difficult and turbulent times can lead to a loss of faith in a father like leader. At UK Mutual, it would be hard to maintain the emphasis on mutuality and stability during periods of change and this can lead to tension (Knights and McCabe, 2015; Knights, 2019).

There were other examples of participants feeling that they had lost faith in leadership. Participants felt let down by managers if they did not respond to poor behaviour in the way which was expected or right (Casey, 1999). Wolfram-Cox (2001) suggests that employees can feel that they have been coerced into change and subsequently revert back to childhood or adolescent behaviours towards

management if they feel unsatisfied with the situation. She highlights how feelings of nostalgia towards the past can also show how employees identify with their employer as a family (ibid). Many of the action research participants experienced significant amounts of nostalgia, as discussed in the previous chapter.

It was difficult to get the action research group to discuss organisation politics in any detail, although it was clearly impacting on their work, see for example the view of this participant, in Action Research Group 3:

"[My experience of dealing with politics is like] … pulling a really heavy weight behind you…. Definitely it's draining, it drains yourself, drains your resources very much. I definitely think it's a heavy load on you."

However, despite indicating that politics most certainly did exist in the organisation, it was difficult to get the participants to articulate what politics within UK Mutual actually looked and felt like in practice. I sensed an unwillingness to discuss it or perhaps an inability to verbalise a phenomenon that was difficult to describe.

The views of the group about organisation terrorists created a useful mechanism by which to dissect further the way in which organisation politics was manifested in UK Mutual. The conclusion of the group was that any disagreement or disruptive behaviour within the organisation was carried out in a very subtle, passive aggressive way. Participants felt that there were many hidden aspects of politics at UK Mutual and often, people's true intentions and end goals were not communicated at the start of projects which led to wasted effort and time:

"[There are] hidden agendas, I guess that's the phrase I would use … for better or for worse which is that it's hidden and then it makes people uncomfortable."

(Participant, Action Research Group 3)

The reasons for this approach was debated at length and the reason decided on by the group was the long length of service within UK Mutual. As one participant put it, if you know you are going to have work with and maybe sit next to someone for 20 years, you are not going to be aggressive or difficult with them as it could make the next 20 years a misery for both of you.

It is interesting to contrast the views of the action research group participants and those of the interviewees. As has already been discussed, the responses of the interviewees were in general more positive than those of the other participants. It is likely that the more senior the employee is in UK Mutual, then they will be more familiar with the changes that are taking place and therefore more comfortable with what is happening (Maitlis and Lawrence, 2007). There may also be a degree of protectiveness on the part of the interviewees and a desire to airbrush the current situation and present it in the most positive light to me, as a researcher and an outsider. For example, a manager who was interviewed talked about how poor performance was not managed well but they felt that this was very much in the past:

"We are a family organisation and by family I mean if your brother is an axe murderer, he's still your brother and you would visit him in prison. Now, we have moved to a more team based organisation and that sort of behaviour is unacceptable."

(Interviewee 1)

This extract has a lot in common with quotes from Casey's (1999) research into family organisations:

> The family is also hierarchical, repressive, paternalistic and deferential to higher external authorities. Employees commonly reported views such as this one … "It's like a family here, we all get on real well … and we're looked after. Sure, we argue sometimes … but you never really get mad …We're a family, you know … and we stick together" (Casey, 1999, p. 162).

Another interviewee contrasts the fear from employees that was discussed in the action research groups with a far more benign style of management:

"So for example, even though we are growing and new people are joining us we're still very collaborative, you know one of the things I like about UK Mutual from what I see, people might see different things but you know, the politics is very, very small if indeed it exists.

We are all wearing the same shirt, we're all playing different positions but ultimately we are all working for the good of the company. There is challenge but the level of challenge, well you might say we should be more challenging of each other, but you know, you tend to find a quick alignment because of very clear common goals that we have set and as a result of the very clear common goals and very

clear objectives that translate into each area, very clear mutual dependency across business functions and business areas, then when a problem occurs its actually how can we sort it out rather than how can we distance ourselves and blame the other person?

So, my experience is very low blame culture, very collaborative, the values of the organisation still pervade through and we are trying to become much more performance orientated as a way of fulfilling our potential in the markets that we serve."

(Interviewee 8)

These alternative views of managers and employees during change programmes are not unusual and may reflect differing levels of attachment to the past and also having different stakes in the future state (McCabe, 2004). The difference in perceptions about politics between the interviewees and the action research group participants is illuminating and perhaps indicates a desire by the interviewees to represent UK Mutual in the best light to me as an outsider as they did in relation to other aspects of the culture. It may also be that at their level in the organisation, they were able to set the agenda and so did not experience politics in quite the same way as other individuals.

6.4 Outsiders and employee identity

"…we know that 'we' are civilised by contrasting ourselves with those who we deem to be uncivilised, with those who do not – or cannot be trusted – to share our values…"
(Beard, 2018, p.14)

As featured in the previous sections of this chapter, groups such as other employees and managers were often discussed in the action research groups, in relation to how the participants perceived them as outsiders or other to themselves. As the research progressed, the way in which the participants viewed their identity in relation to these others was also discussed. This is a key element of identity, where individuals identify who is included in their group as well as who is excluded (Beard, 2018). Lok and Wilmott (2014) state that there is a need to protect "our thing" (p.218), i.e. what makes 'us' us as part of identification and anything (or anyone) that affects that can be seen as a "... menace to our way of life…" (p221). This can also lead to any issues within an organisation that are felt by employees being projected onto these other groups (ibid).

This section illustrates these discussions and also highlights how the participant's views of their identity in relation to others changed over the period of the study. As section 6.3 shows, the views of the participants changed to become more sympathetic towards some individuals within UK Mutual who had been the subject of negative views at the beginning of the study. Other researchers have suggested that this can be an outcome of qualitative research in this area as it enables the participants to understand others more and recognise why they behave as they do (Krumer-Nevo and Sis, 2012). This illustrates how undertaking these types of discussions during a change programme can be a useful way to break down barriers between different groups within an organisation.

6.4.1 Participant views at the beginning of the study

When the action research groups were discussing outsiders, the discussion mostly focussed on the use of consultants within UK Mutual, as well as other groups of employees within the organisation, such as those who had been mutualised (see section 6.2). UK Mutual is a heavy user of consultants and at the beginning of the study, there appeared to be a strong tendency to view consultants as a way to get things done, perhaps to counteract the slowness that permeates UK Mutual's decision making processes and day to day working:

"Isn't a consultant just another example of when we don't do stuff ourselves, just don't get on and do it? A consultant will come in and get on and do it…"

"..and I hear that … sometimes the consultant's word is taken more seriously than our own. Heard that on two or three occasions."

(Participants, Action Research Group 2)

"Because actually we think we don't know how to do it or we're not going to do it, we'll pay somebody to come and do it and they'll do it for us ... I don't think it's even about trusting ourselves to do it; we just don't even want to try.…"

(Participant, Action Research Group 3)

This realisation of the value of using consultants to move work forwards is tempered by a frustration that the words of consultants are taken more seriously than the words

of employees, even if they are saying the same thing. There was recognition by the

participants though that because senior leaders were paying for the advice from

consultants, it might make them more likely to listen to this advice. In addition, there

was discussion about how consultants and/or contractors were used to fill gaps in

resource at UK Mutual, either because there weren't enough internal people to do the

job or because the skills weren't available internally. Interestingly, contractors (those

who are taken on to fill a specific role) were perceived far more positively than

consultants:

"… there's a definite difference, your contractors are there to do a job, they're there to fill a hole but

shouldn't be there forever … other areas claim everyone is a consultant and the amount of day rates

that consultants are charging, actually they are just a contractor, that's all they are."

(Participant, Action Research Group 2)

The participants also highlighted the lack of process to bring consultants into the

organisation with people being taken on who haven't had to go through any risk

assessment or procurement processes. Instead, existing contacts or friends of

senior managers were seen to be joining the organisation rather than trying to recruit

new employees. This led to suspicion in the group about the motives for doing this.

Whilst the group were understanding that it was useful to get views from outside of

UK Mutual (which can sometimes be difficult due to the length of time that some

employees have worked there), they expressed surprise that using consultants was

the only way in which this could be achieved. Again, this could be a reflection of the

esteem that consultants are held in the organisation by senior leaders: that existing

employees are not trusted to be able to deal with new strategies and ideas. This led to feelings of disempowerment from the participants:

"… I thought we were quite good about being empowered but [someone I know who works in one of the support departments that was going through a lot of change and using consultants] said that she doesn't feel empowered. She doesn't get any support from the department … it feels like you do a really good job and then someone [external] will come and critique it or actually say it's their work which I think is worse if I'm honest."

(Participant, Action Research Group 2)

As Mosonyi, Empson and Gond (2019) identify, consultants may represent a threat to the identity of employees and managers due their perceived levels of knowledge and their ability to interact with leaders at the highest levels of the organisation. This can contribute to feelings of loss and dissatisfaction by existing employees.

Another risk of using consultants which was highlighted by the participants was the knowledge drain that can take place if external resources are used excessively:

"They forget though that all the knowledge goes. That's really bad, you get someone in they get all of the knowledge then thanks very much, good bye and they haven't transferred that on and again they have to bring a consultant in because we haven't got the knowledge."

(Participant, Action Research Group 2)

There were fears about the lack of future proofing of knowledge within UK Mutual if this unfettered use of consultants continued. This usage of consultants is likely to continue into the future as the pace and volume of change increases at UK Mutual. The tension between bringing in consultants to drive progress and ensuring that these consultants integrate fully into the organisation is challenging.

6.4.2 Participant views at the end of the study

By the end of the study, the views of the group towards outsiders such as the consultants who had been brought in to support the change programme was extremely negative with participants commenting that the consultants were not a good fit with the organisation and behaved in inappropriate ways. Perhaps this is because the consultants had not learnt the ground rules for the organisation when they were first in contact with UK Mutual (Czarniawska-Jorges, 2004) and so did not behave appropriately. Alternatively, it may be that as the participants tried to create certainty through change by creating their own narratives about their identities in the organisation, they also created narratives about outsiders within the organisation (Hay, Parker and Luksyte, 2020). This identity sense making activity particularly takes place when a change relates to a loss of identity for employees, for example changes to job roles or ways of working (ibid). In this situation, outsiders such as consultants may be perceived as a threat.

The behaviour by consultants was seen by the participants as counter cultural, for example using offensive language and swearing in meetings. Whilst the participants

criticised the consultants for behaving in this manner, they were even more critical of senior managers and leaders within UK Mutual who had failed to deal with these behaviours. In fact, managers were seen as rewarding the consultants by continuing to work with these individuals and organisations. One participant in action research group 6 said that she almost felt as though she had been:
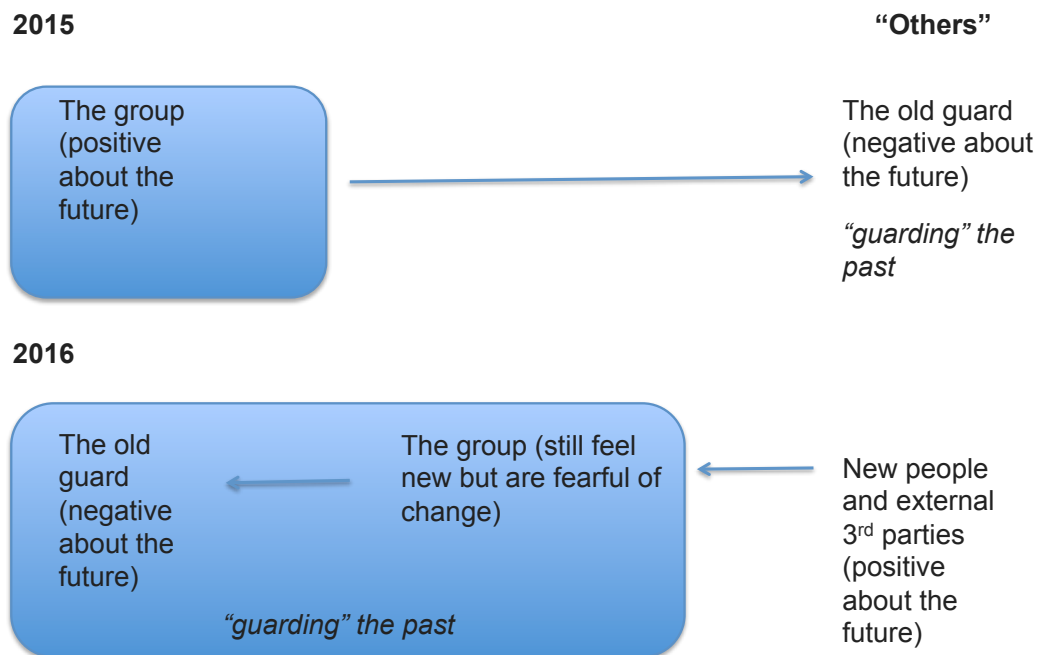
"… let down by my parents who had not treated everyone fairly … and not punished a sibling for bad behaviour."

This is similar to the feelings of disappointment towards management that were discussed in sections 6.2 and 6.3. There was a fear that if new people came into the organisation and didn't fit with the culture, then this would "break the chain" (Participant, action research group 5) of the culture. This fear led to a change in views by the participants towards longer serving employees. In contrast to the view about consultants and outsiders, their views towards long serving employees had softened by the end of the study, with participants in action research group 5 stating that they felt that they wanted to protect the organisation, its differences and culture during this period of intense change

One of the key insights that was gained from the action research groups was how the group's view of themselves within the organisation changed over the twelve month period of the study. Initially, the group participants saw themselves as a positive force within the organisation, whilst longer serving employees ("the old guard') within the organisation were seen as more negative about the future. After twelve months, the group had moved closer to the views of the "old guard" and were becoming more

fearful of change whilst new joiners had taken the role of being advocates for

change, as shown below:

Fig 14:

2015   **"Others"**

The group
(positive
about the
future)

The old guard
(negative about
the future)

*"guarding" the
past*

2016

The old
guard
(negative
about the
future)   The group (still feel
new but are fearful of
change)

New people
and external
3rd parties
(positive
about the
future)

"guarding" the past

Change in identity of the action research group participants

It appears that the group were engaging in othering (Gabriel, 2012), whereby they

were creating their own identities in relation to other groups or individuals within the

organisation that they felt opposed to, despite working closely together (Kovach,

2017). As Gabriel (2012) identifies, othering goes beyond simply criticising other

groups. In sociological theory, othering means that the other group should be denied

basic entitlements and human characteristics and ultimately may be excluded

(Wackernagel Bach, 2005; Gabriel, 2012; Krumer-Nevo and Sis, 2012; Fitzsimmons,

2014), i.e. they become outsiders. In this context, the outsiders in relation to the

action research group changed during the year of the study. Initially, the outsiders that were discussed and vilified were represented by long standing employees and by the end of the study the outsiders were represented by new joiners and individuals from third parties such as consultants who had entered the organisation. Fitzsimmons (2014) explains that it is possible for the composition and make up of groups seen as outgroups to shift although she doesn't specifically mention that this can happen within the same organisation over a period of time.

As Hay, Parker and Luksyte (2020) identify in their study, employees' views about change can adapt over the period of a change programme:

> Emma … began her narrative of the change by recalling a sense of excitement for the opportunity to improve the organisation and described actively participating in a number of consultation activities. However, her narrative evolved into a realisation that the change process was 'all spin' because the people 'already knew exactly what they wanted to do'. So any 'consultation' even when they did call it what wasn't real (Hay, Parker and Luksyte, 2020, p. 15).

In this example, feeling like she had very little opportunity to truly participate and influence the direction of the project, meant a change of view and identity for this employee (ibid). She started to view the change and the people involved in it as being outside of her identity as an employee.

The shift that took place at UK Mutual is perhaps an indication of the extraordinary degree of change that had taken place in the organisation during this time. This was acknowledged by the participants as unprecedented. In addition, the action research group became a safe place to reflect on these changes and so the participants were very open about their feelings. Certainly, in the final action research group when I discussed the analysis to the group they all agreed that they had not previously discussed some of the issues that arose in the groups. They felt that they were able to talk freely and be supported by their colleagues. This may be a useful learning from the study that could be applied to other change programmes. It seems as though having time and space to discuss concerns and fears about change can be a very positive experience for employees. In this final action research group, when I explained the initial findings of the study to the group, they were interested in these findings and felt that they accurately reflected the views that they had discussed in the groups. However, when I talked about how I had perceived that their views of others had changed during the period that we had worked together, they were unaware of these changes in themselves which suggests that they had allowed their unconscious thoughts to be voiced in the meetings.

Change had also become the norm during this period so perhaps the group started to feel more in common with the old guard than they had previously. Perhaps the group wished to except themselves from the change and so had allied themselves with the old guard rather than with the newcomers who had instigated the change.
(Meriläinen et al., 2008)

It appears that the stories that they told about others during the action research groups were untold stories (Donnelly, Gabriel and Özkazanç-Pan, 2013) and had not previously been discussed. Interestingly, once these stories had been surfaced and discussed in the final action research group, the participants were in agreement that this was how they felt. They discussed at length how they wanted to guard and protect the past history of the organisation, acting as a custodian (Maclean et al., 2014), feeling that this was now their role given their own length of service (Rafferty and Restubog, 2017). Therefore, the previous role of the old guard as 'others' had been completely reversed into a role that the participants now wanted for themselves. Driver (2009) describes participants telling her of their "epic journey" (p. 361) through change and how they had understood the perspectives of others and achieved a new perspective of their own through the organisation change process. In common with the classic structure of epic tales (Gabriel, 2000; Booker, 2004; Gabriel, 2004; Campbell, 2008; Gabriel, 2018b) perhaps the new viewpoint of the participants at the end of the study is a reflection of the journey that they took through the research process. In this journey, they survived the change by learning and developing as an individual (Driver, 2009).

6.5   Conclusion

In conclusion, there is a paradox at UK Mutual in that there is a strong desire amongst the management population to get better at change and a recognition that change is both inevitable and necessary. However, the history of the organisation and the identity of the employees within it are both acting as filters to any change and

are in danger of overwhelming it, meaning that change won't be achieved. It is this

paradox that is felt by employees and which contributed to the stories about the

organisation that were told in the action research groups. The current period of

change at UK Mutual is unprecedented in its history and change is speeding up, but

this speed of change may also be limited by what can actually be achieved at an

organisation like UK Mutual given the speed of decision making and desire for

consensus.

The bringing in of outsiders such as consultants to support these changes is also a

cause of conflict as their behaviours may not be in line with the strong organisation

values which leads to conflict with existing employees. The strong cultural pillars of

UK Mutual act as anchors to the achievement of change. By protecting employees

from change and not involving them, this conversely seems to increase the likelihood

of change resistance.

The stories gathered and analysed suggest that UK Mutual is approaching a tipping

point whereby the desire and need for change will soon be overwhelmed by the

culture, history and values of the organisation. However, the analysis also suggests

that there are lessons that can be learnt from this that could be applied both at UK

Mutual and elsewhere. In particular, the participants of the study unanimously said

that they had found the experience of having the time to reflect on change through

the action research groups beneficial and that this was an experience that they had

not had at other times in their employment. This suggests that it may be useful to

build time for such activities into change programmes, bringing existing employees of

all lengths of service, seniority and experience together, to understand the upcoming

changes and discuss how they feel about it. In many cases, it seems that there is

little reflection time built into change programmes.

The analysis has also provided an opportunity to reflect on how change actually

takes place in organisations and the impact that consultants can have on the change

process. Whilst it is certain that consultants can bring additional expertise to an

organisation that may not exist within the organisation, their impact and fit with the

organisation culture has been shown to be important. There needs to be time taken

to reflect upon what the organisation culture is and how the consultants may need to

adapt to fit with this. Consultants need to take time to really understand the

organisations that they are working with and consider the extent to which change can

be achieved in this organisation rather than simply applying a one size fits all change

management toolkit to every organisation. An alternative model of reflective change

consulting practice along with other implications from this study, will be considered in

the next chapter.

7 Conclusions

7.1 Returning to the research aims

In this research, I gathered stories about change from employees within a mutual insurance company that was experiencing a period of profound and unusual change, to consider the following research aims:

1. What stories are told by employees during a change programme?

2. How can these stories help us understand more about the organisation culture and the way the organisation approaches change?

3. How can these insights be used to inform management consulting practice?

The implications of this study will be considered now in relation to these original research aims.

7.1.1 Stories told by employees during a change programme and how these stories can help us understand more about the organisation culture and the way the organisation approaches change

When the stories that were gathered during the research were analysed, two key themes emerged that are relevant to change management in organisations. Firstly, that many stories were told about the history of the organisation. These stories illustrated how history was important to the participants and how they felt that it impacted on the way that UK Mutual continued to operate to this day. This includes how change is managed. Secondly, there were also many stories about individual

identities in the organisation. These stories illustrated how these identities were dynamic and changed over the period of the study.

Whilst organisation history and employee identity during periods of change have already been investigated by other researchers (Venus, Stam and van Knippenberg, 2018), the impact of these areas on the way that change is managed has not yet been fully recognised. My research recognises the importance and also the dynamic nature of these factors, and their interactions with organisation culture during change. This research also realises the potential of using this knowledge to create a different approach to organisation change and organisation change consulting.

It is clear from the analysis that participants felt a strong attachment to the history of UK Mutual and yet, this has been largely ignored during change programmes (Foster et al., 2017), despite there being an increased interest in the field of organisation history (Johnsen and Berg Johansen, 2019). At UK Mutual, the desire of some individuals to protect the history led to some negative behaviours and some individuals being labelled as organisational terrorists. The participants also experienced feelings of nostalgia for the past and a sense of loss in relation to the future.

My research shows that organisation history is something that must be considered during change programmes to understand the likely reaction to change by individuals. This supports the outputs of research such as Rafferty and Restubog (2017) who argue that the organisation context of change should be examined prior to the change process, in order to increase the likelihood of success. This is also

supported by other research which highlights how organisation history can be used to create more positivity about change, by emphasising what is going to stay the same (Mordhorst et al., 2015; Venus, Stam and van Knippenberg, 2018). Similarly, Foster et al (2017) suggest that historical narratives could be used more strategically during change programmes to emphasise desired behaviours and cultural characteristics and to create a feeling of belonging (Ravasi, Rindova and Stigliani, 2019). My research represents an extension to these findings.

The stories told by the participants at different stages during the research illustrated how they felt that their sense of identity had changed during the change programme. This identity was also related to how they saw themselves in relation to others and this shift would not have been recognised without the process of gathering stories. Other researchers have focussed on identity in organisations, (Fitzsimmons, 2014; Lok and Wilmott, 2014), and how these identities are maintained through language and actions (Anderson and Gold, 2009). However, the way in which employee identity can shift during a period of change has been little considered.

My research supports and extends existing research by suggesting that employee identity is a key factor that must be built into organisation change programmes. In addition, the dynamic nature of identity that was illustrated through this research also suggests that employee identity should not be regarded as static throughout a change programme. The analysis showed that there was a strong link and congruence between individual employee values and organisation values at UK Mutual. This was something that was seen to be important as a reason for joining

and staying with the organisation and was a key aspect of identity formation in the organisation. Existing research shows that it is important that there is alignment between organisation values, employee values and change messages, if a change programme is going to be successful (Conroy, 2010; Boudens, Palmer and Weddle, 2019). However, this purpose led change is often lacking in existing change theory and practice (Pink, 2011).

By revealing the importance and dynamism of employee identity, the link to values and organisation culture, this research presents an opportunity to create a new approach to change management. This approach is supported by Mike (2014), in his conversation with Edgar Schein which highlights the need for greater sensitivity to an organisation's culture before trying to create change. He suggests asking questions to fully understand the culture and history and recommends greater use of applied knowledge in the field of organisation change research, bringing together knowledge gained by consultants as well as academic research to move the field forward (ibid).

In this research, a process of story gathering was used to bring organisation history and employee identity into awareness and to reveal the hidden organisation (Gabriel, 2018b). As stories are temporal (Brown, Gabriel and Gherardi, 2009), telling and gathering stories was a way to enable the organisation history to be unpicked and understood at a deep level (Bliesemann de Guevara, 2014). Reflecting now on the stories that were gathered in this study, I can see that whilst I was convinced by the definition of story suggested by Gabriel (2000) at the start of the research, many of the stories that were gathered were more similar to those defined by Boje (2001). At the start of the research, I had thought that the stories that I would gather would

conform with Gabriel's (2000) definition and would be detailed narratives containing plots and characters (ibid). However, many of the most interesting stories were more similar to the ante-narratives or fragmented, collective and emergent stories (Boje, Haley and Saylors, 2016) suggested by Boje. They were snippets of information and experiences that had meaning for the storyteller but were actually also understood by the other participants in the group. Observing this at the time and reflecting on these stories now, I can see how I would have failed to recognise these are stories if I had not considered Boje's work and his definition of story which is broader than that suggested by other researchers. Therefore, as the research has progressed, I have become more influenced and convinced by the approach to defining story suggested by Boje (2001).

At the end of the research, participants commented on how positive they found the experience of sharing their stories and highlighted how this did not happen during current change programmes. Therefore, my research contributes to the understanding of change processes by both highlighting the importance of organisation history and employee identity during change and also suggesting an approach to engaging with groups and individuals in organisations during a change programme. Anderson and Gold (2009) highlight the value that participants in action learning sets took from the opportunity to interact and be challenged by others. Whilst the experience can be uncomfortable, it creates many learning opportunities (ibid). Likewise, the participants in this study found the experience helpful and rewarding.

Gathering stories and narratives using appreciative inquiry (Fortune et al., 2015) revealed aspects of how employees saw themselves and also their views of the organisation history. Increased understanding of these views provides an opportunity for leaders and change agents to use these in constructing narratives to support future change and employee sensemaking. As Driver (2009) suggests in her recommendations for future research, "this opens up new conversations in organizations as well as many new avenues for exploring stories of organizational change … as [a] means for understanding the conscious and unconscious aspects of the messiness of organizational changing" (p. 366).

These conversations would enable change agents, managers and employees to obtain access to values, histories and identities and track these through the change process. Doing this story work (Chlopczyk, 2018) at the beginning of the change may make it possible to create a change programme that is relevant to the organisation. This interaction between history, identity and change and the opportunity to uncover these through work at the start of a change programme, is summarised in the diagram overleaf:

Fig 15:
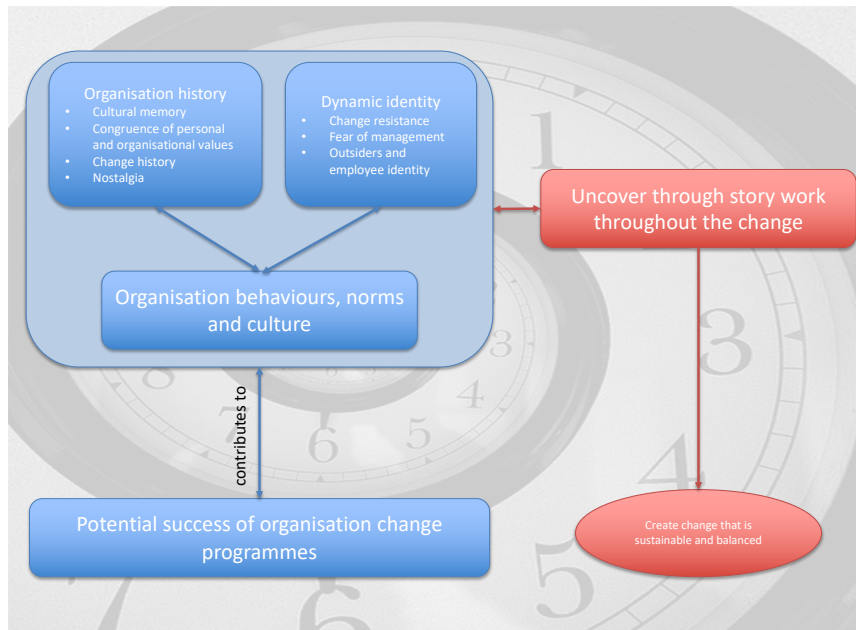
The story work approach

This approach, making use of the interviews and action research group approach from this study, allows more marginalised voices within the organisation to be heard (Bell and Taylor, 2011) and can be used to develop themes that can be woven into the change programme.

7.1.2 Insights to inform management consulting practice

The research also has insights for management consulting change practice. Based on the analysis, I argue that a new, reflective model of change consulting is needed, which recognises the hidden factors impacting on change in the organisation: organisational history and employee identity. This model of consulting would have reflection time built into it, to enable change practitioners to be better at supporting

managers in reflecting, which many managers and leaders find difficult

(Czarniawska, 2016). The model is summarised in the diagram below:

Fig 16:
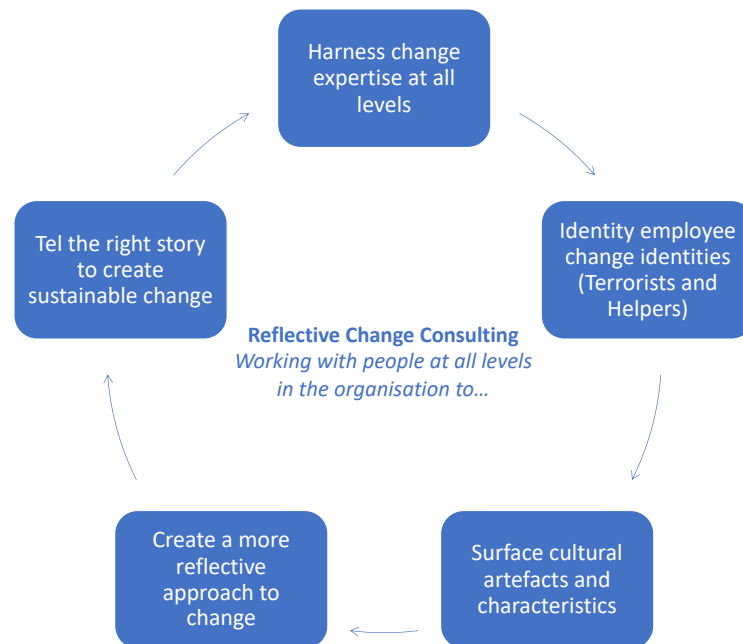
Reflective change consulting practice

Johannson (2004) argues that it is important for a consultant and their client to co-create a story together on each piece of work that they do together. Equally, Johansson (2004) identifies that the consultancy relationship offers:

> the client a space outside of the daily routine for reflection and learning …
> where the client is not totally pre-occupied by daily activities ... Using such
> space can be seen as a way of enhancing reflection, making reflection a
> specific act (Johansson, 2005, p. 350).

Whilst this was aimed at external consultants, there are opportunities for change agents within organisations to attempt to create more space for reflection (making use of the appreciative inquiry approach in this study) to improve their consulting relationships (Raelin, 2002; Johansson, 2004; Puutio, Kykyri and Wahlström, 2009). The participants in the study found that by having a safe space to reflect, they were able to create meaning and make sense of the change process and their role within it (Czarniawska, 2013). There is so much pressure to act in organisations (particularly for leaders) that the time and space to reflect is very valuable (Kaufman, 2012).

As a result of the experiences of the participants in this research, there have been changes to the way in which UK Mutual undertakes change programmes. For example, recently UK Mutual has stopped activity halfway through a major process change project and spent time going back to the project stakeholders, gathering their views and stories about the project through interviews. These interviews were then analysed for themes which were reflected on by the project board, with changes being made to the way the project was managed and run. Then, once this work was complete, the project restarted. The process was then repeated at the end of the project. The project has only recently finished but initial views from within UK Mutual seem to suggest that the project had greater stakeholder engagement than other similar projects. The project was also delivered on time and on budget.

This model of reflective change consulting allows time for pause and reflection during change programmes to enable the organisation to be in the best position to achieve success. The feedback from the research participants also suggests that taking

regular pauses during the change programme to reflect, learn and adapt is beneficial.

This will ensure that the whole organisation can be understood and included in a

change programme, both the seen and unseen. And the heard and unheard.

7.2 Contribution of this research to research methods

As discussed in the introduction, there were similarities between this research and an

ethnographic study. However, there were also many differences which means that it

was not ethnographic research. For example, whilst there was a lengthy period of

study, there were no participant observations carried out in the workplace (Saunders,

Lewis and Thornhill, 2009; Van Maanen, 2010; Watson, 2011; van Hulst and Ybema,

2020). Equally, whilst I worked at UK Mutual during the research, I was not a full

time participant in the organisation (ibid). There is an increasing interest in

ethnography, with researchers such as Watson (2011) arguing that there is a need

for more of such studies in the fields of organisation and management studies.

As already discussed, I was keen to write and research differently (as discussed in

the introduction to this thesis) and to recreate or revive some of the classic case

studies from the past by undertaking a detailed and in-depth case study. And so

now, having reflected on the study, I think that this study is a variation on existing

corporate ethnography combining action research and appreciative inquiry with a

detailed case study. For example, Fayard and Van Maanen (2015) state that their

work into organisation culture influenced the way in which culture was talked about at

Trifecta (the organisation studied). They argue that:

by writing culture and circulating our depictions, we created a new way for some organizational members to think and talk about their culture (and it's discontents, murky fault lines, uncertainties, interpretative divisions etc) while at the same time, the response to our writing both sharpened and altered our own understandings of culture, the firm and the work we were doing (Fayard and Van Maanen, 2015, p. 5).

There are similarities here with the views of the participants in my study, who reflected that their involvement in the action research groups had stimulated their thinking and unearthed stories that otherwise would have been hidden. There are also similarities between the two organisations studied, which have already been discussed in this thesis. Equally, the research opened by eyes to factors that influenced organisation change that I had not considered prior to undertaking the research. However, the difference between my research and Fayard and Van Maanen's (2015) study was that the methods used to reach this conclusion were different. My research involved interviews, action research groups and appreciative inquiry whilst Fayard and Van Maanen (2015) used participant observation, site visits and interviews. Their work was also conducted over a very long period of time whilst I was able to obtain insights into the organisation relatively quickly. This is often the case with corporate ethnography, where there are shorter timeframes than classic ethnography (ibid). However, even with this consideration, I would still argue that the approach that I used enable me to get good insights into the organisation in a relatively short space of time.

Van Hulst and Ybema's (2014) conclusions support this result as they suggest using other forms of data gathering including interviews and "participatory, observation based methods" (p. 384) to explore organisations in the widest way possible. They argue that not doing so can lead to misinterpretations and cite the different definitions of stories by Boje (1991) and Gabriel (2000) as examples of this. As Boje and Gabriel used different research methods, van Hulst and Ybema (2014) argue that this led to them gathering different types of stories in different settings. I used multiple settings in my study and doing this with an "ethnographic frame of mind" (Fayard and Van Maanen, 2015, p.17) enabled even greater insights to be gained.

7.3 Contribution of this research to existing organisation change and organisation storytelling research

This research is relevant and important to the field of organisation change research as it responds to demands by existing scholars for greater use of employee identities and organisation histories in the field (Hay, Parker and Luksyte, 2020). In addition, it offers a different approach and extends the existing research by utilising both interviews and action research groups and by working with the organisation being studied over a period of time. As Hay, Parker and Luksyte (2020) identify in their conclusions, most existing research has relied on interviewing employees and so were not able to track any change in their views over time. This was the case in my research and spending more time in the organisation led to some very interesting conclusions.

Similarly, there has been much research into storytelling in organisations but little research has been undertaken on the activity of storytelling itself rather than the content of stories (van Hulst and Ybema, 2020). Existing literature has also treated organisations as the same and that stories told in one part of the organisation would be consistent across the whole organisation (ibid). My research showed that the stories that were told were different between different groups, i.e. between the managers (interviewees) and the employees (action research group participants). In addition, the place that the stories were told, whether in an interview or in a group setting, may also have impacted on the stories that were told. This reflects an addition to recent research in this area, for example van Hulst and Ybema (2020).

Sturdy and Grey (2003) highlight the mechanistic natures of many organisation change management programmes, where only the change is of interest and past histories or periods of stability are neglected. There is too much focus on constant change rather than recognising that periods of stability are both necessary and desirable. They also suggest that existing change management processes focus too much on the managerial voice, without considering the voices of other parties, for example employees (ibid). The outcomes of my analysis add weight to their arguments, by emphasising the importance and impact of both organisation history and employee identity in successful organisation change.

In this research I was working with the same organisation over a period of time, not just to gather stories about organisational change but to reflect upon these stories

with individuals and groups within the organisation over an extended period of time. (This was a recommendation for further study stated in Driver (2009)). The same stories were revisited multiple times with the same participants during the research to determine if there are ways in which to utilise stories and story work (Chlopczyk, 2018) to create different conversations about change in organisations (Driver, 2009). My research therefore is an extension of the work of others into the use of stories as a sense making tool (Maitlis and Lawrence, 2007) during change (Gioia and Chittipedi, 1991; Gabriel, 2019b) and an advancement of the conversation about organisation storytelling (Bansal and Corley, 2011; Corley and Gioia, 2011). Pedersen (2009) states "organisation change is story driven, that is, change occurs in stories of change, and when members of organisations tell stories about change events to make sense of change: (p. 391). My research extends this further by bringing together multiple voices in an organisation to understand their individual realities (Pedersen, 2009). This led to the interesting themes of organisation history and employee identity which otherwise would not have been uncovered.

7.4 Reflections on the project

Every research project has its limitations and this one is no exception. Based on the methodological choices made, there are areas which could be improved in this research, were I to undertake similar research in the future. This section outlines these gaps and makes recommendations for improvements.

7.4.1.1 Theory building from a single case

This research makes no claim to create generalisable outcomes due to its interpretivist paradigm as well as the difficulties in generating cause and effect from narrative data (Gabriel, 2017), Many researchers argue that it is also not possible to build theory from a single case due to potential bias, lack of replicability and objectivity (Flyvbjerg, 2006; Steenhuis and Bruijn, 2006). Dyer and Wilkins (1991) argue that it is not possible to build a theory from a single case and that multiple cases are required. However, I argue that it is possible to start building theory from a single case, based on this research and also on the views of other researchers.

Steenhuis and Bruijn (2006) argue that using the Eisenhardt (1989) approach to case study, as I have done here, enables theory creation as it includes the objective strength of Yin's (2014) approach with the inductive nature of grounded theory. Indeed, Darke et al (1998) suggest that this approach creates a "roadmap for theory development" (p.275) and single cases are often used to develop a theory and explore concepts. These researchers argue that case studies using this approach create ideas and theories that can be tested in further studies.   To enable this, Steenhuis and Bruijn (2006) suggest that a researcher should cycle through data collection and analysis continuously, using one to feed into the other. This was the approach taken in this research, with the outputs of the initial analysis of the interview data feeding into the design of the action research groups. Steenhuis and Bruijn (2006) suggest that this research process creates a credible study.

Other researchers remind us of the classic case studies from social science which often contained in depth study from a single case. Dyer and Wilkins (1991) in their response to Eisenhardt (1989), argue that such cases advanced thinking in the field and therefore single cases shouldn't be dismissed. Such cases can lead to deep understanding and insight providing rich descriptions of context are given, and thus are more suitable for books and theses rather than journal articles (ibid). Perhaps this is why these types of study are less popular as so much research must be published in journal articles. The classic case studies are seen as exemplars and good stories (Eisenhardt, 1991), which are referred to regularly by researchers for insights and new directions (Dyer and Wilkins, 1991; Flyvbjerg, 2006; Eisenhardt and Graebner, 2007; Gabriel, 2019a). Whilst it might be difficult to generalise based on the outcomes of a single case as any theory built is likely to be limited to that case (Eisenhardt, 1989), Flyvbjerg (2006) states that it is possible to generate knowledge upon which a theory can be built. In the case of this research, I wanted to build an understanding of how change is enacted in an organisation and a single case is an appropriate method to do this, particularly in creating an exemplar case or new ideas for further development.

Eisenhardt and Graebner (2007) also state that a single case which has been chosen because it is interesting can be used to build theory if a large variety of organisation actors have been involved in the research to avoid bias. The data should also be presented in detail and emerging theories and conclusions should be supported by direct quotations from the participants and other evidence (ibid). Whilst the number of organisation stakeholders involved in this research is relatively small, the approach

taken to analysing and presenting the data does provide the amount of detail

suggested by Eisenhardt and Graebner (2007). In addition, Eisenhardt (1991)

argues that even if a case study tells a good story, it cannot be considered to be

good research unless it is also underpinned by rigorous methods and links to

previous literatures.

Therefore, supported by the arguments above, I assert that it is possible to begin

building a theory based on the outcomes of this.

7.4.1.2 *Participation and power*

As already highlighted, due to the small sample size and the method of choosing the

participants, there was not equal opportunity for inclusion in the research (Yin, 2014).

Interview participants were selected by organisation insiders on the basis of who they

felt would provide a good cross section of managers. It is highly likely that the

interview participants were well known to the organisation insiders and possibly liked

by them. So, the likelihood of bias here is high, as these participants may not reflect

the views of the majority in UK Mutual. They may have been the usual suspects who

are always asked to take part in focus groups and discussions and who all had

similar roles and experience (Duarte et al., 2015). To compound this, the interview

participants were then asked to suggest participants for the action research groups.

Again, this could have led to bias and opportunities to hear the untold stories in the

organisation (Donnelly, Gabriel and Özkazanç-Pan, 2013) may have been missed.

To avoid this, the research could have been opened out to everyone in the organisation, through an open invitation to all employees to attend action research groups or by a questionnaire that was sent to all employees. However, it would not have been possible to conduct more action research groups due to time constraints and a questionnaire may not have delivered the rich data that was gathered in the interviews and action research groups.

Although I started the research with the intention of creating a highly participative piece of research, the power to drive the research still resided with me rather than the participants. This is likely to have affected the research (Brinkmann and Kvale, 2005), particularly in relation to the interview where I had set the broad agenda of the interview through the interview script. Silverman (2013) and Duarte et al (2015) question the relevance of data gathered from interviews as they suggest that an interview is an artificial situation shaped by the researcher. In addition, although I participated in the research groups, my role was to manage the process, shaping the agenda and feeding back to them whilst still encouraging creativity, similar to that of a theatre director (Gozzoli and Frascaroli, 2012) so the balance of power was not equal.

It may have been useful to increase the number of participants in the action research groups or undertake a greater variety of action research groups to increase the level of participation. Whilst this would have been time consuming, it would have enabled a wider variety of organisational voices to be heard. Fortune et al (2015) highlight the difficulties of having fluctuating membership of action research groups, as time

has to be spent introducing them to the process if they have not been involved from the beginning.

7.4.1.3 Insider/outsider research

Although I am not an employee of the UK Mutual, I have worked within it as a consultant for a number of years prior to and during my research. During the period of my PhD research with the organisation, my relationship with it was fluid (Thomson and Gunter, 2011) and shifted constantly between researcher and consultant, even on the same day. Thomson and Gunter (2011) talk about how they had "fluid identities" (p 10) during their research, moving between confidant, consultant, researcher and advisor. This reflects on my own multiple identities at UK Mutual during the research process as I undertook consultancy work within the organisation such as facilitating meetings and designing some e-learning. This was in addition to my research activities.

I did attempt to keep my involvement in paid consultancy work in the organisation to a minimum during the time I was conducting the research. This was in an effort initially to avoid conflicts of interest however I quickly realised that in research such as this, it would be impossible to achieve this separation between my identities at UK Mutual. Despite my best efforts to ensure separation, my different roles at UK Mutual will certainly have influenced my thinking in conducting this research (Grey and Sinclair, 2006; Gabriel, 2018a). Bryman and Bell (2011) talk about this, stating that it would be impossible for a researcher not to be influenced by their experiences.

On reflection now, I realise that research such as this is always going to be complex and will require a switching of roles for the researcher (Humphrey, 2007). For example, during the course of my consultancy work, I did attend meetings where I heard about change initiatives that were then discussed in the focus groups. I did not reveal my knowledge to the group as I felt that this would not be appropriate due to client confidentiality. This switching between involving myself in the organisation and distancing myself from it (Bell and Taylor, 2014) was challenging but necessary to ensure that I was respectful and ethical (Macfarlane, 2010) in my dealings with both my client and the participants in the research. It was important that both parties felt that they could be honest and open with me without fear that their comments would find their way into my research if this is not where they had been obtained.

Empson (2013) uses the metaphor of an extra marital affair to illustrate the challenge of having dual identities of researcher and practitioner in the same organisation and for me, this certainly felt to be true at times. This was particularly difficult when I heard of changes (in other meetings) that would directly impact the action research group participants but could not share this with them (Whittle, Mueller and Mangan, 2009; Clifton, 2014). Again, this highlights the difficulties and conflicts when having multiple roles in an organisation. Reflecting on this now, despite my initial concerns about how difficult this might be, I'm not sure that I felt overly conflicted by these roles (Empson, 2013). If I had, I might have stopped doing consultancy work at UK Mutual altogether during the research process. Returning to Empson's (2013) metaphor of the researcher and the affair: she uses the metaphor of an affair as a

means to understand her feelings about moving between her roles as a consultant and a researcher and how this sometimes created conflict. But she also highlights the need (and attraction) of segmenting her life between these two different roles and how each role fulfilled a need for her (ibid). In my case, I found each role satisfying and did attempt to separate them out. For example, by wearing different clothes for each type of interaction. I was more informal in my dress for my research activities than in my consultancy work, which meant that in most situations, I did not do consultancy work and research on the same day. Empson (2013) also highlights how she used clothing as a means to separate the roles. There is a tension between the roles but it is possible to live with that tension (ibid).

This does raise some interesting points about my role as a potential insider (Coghlan, 2007) during my research and whether this could have affected my views (Roth, Shani and Leary, 2007). As McCracken (1988) points out, "…intimate acquaintance…can create as much blindness as insight. It can prevent the observer from seeing cultural assumptions and practices." (p12). However, this experience can also be used to organise and dissect the data appropriately (ibid) and so is not necessarily a disadvantage. It is something that I had to be aware of in order to create enough distance to enable me to challenge my assumptions (McCracken, 1988; Humphrey, 2007; Coghlan and Brannick, 2014). That being said, although I have knowledge about the organisation, I am not a true insider as suggested by Coghlan (2007) as I am not an employee, merely an outsider with experience of the organisation (Ybema, 2014). My relationship with the organisation will always be different to that of an employee/employer relationship and my knowledge of the

organisation is limited to my commercial dealings with it and not on a day to day basis. Indeed, researchers such as Thomson and Gunter (2011) challenge the idea of anyone being either an insider or an outsider as our experiences are all so different and so this binary distinction is not helpful. I see myself more as an insider outsider: someone who is external to the organisation but has a lot of knowledge about it. I am seen as an outsider by others but also am able to fit into the organisation because I have worked within it for a long time. This reflects a challenge to my identity as a researcher (Empson, 2013) but one that I was happy to wrestle with as I undertook my research.

7.4.1.4 Reflexivity in analysis

Qualitative research is shaped by the views and biases of the researcher, both in the way that the research is structured but also in how the data is analysed. Therefore, it is important for the researcher to take a step back and consider their assumptions and the impact of these on their own research (Gabriel, 2018a). However, it is extremely difficult if not impossible for the researcher to remain completely separate from their own biases, even if they are aware of them (ibid).

In this research, as the research was conducted and analysed by me, there is a risk that my own biases have shaped the way in which the data was grouped and analysed. This bias is not always a negative thing though as having some prior knowledge or personal connection to something being investigated can lead a researcher to notice aspects of the data that another researcher may not (Hollway

and Jefferson, 2000). In this case, my existing knowledge of the organisation certainly helped me to frame the research and understand some of the elements that emerged from the data.

Other researchers (McCarthy, 2008; Clark et al., 2010) suggest using third parties to validate the coding process to ensure that the coding scheme is reliable and can subsequently be relied upon as the basis for any model or theory. Gabriel (2018) also talks about the co-creativity required for true reflexivity in qualitative research, so that both the object and the subject of the research undertake reflective activities together.

Whilst I did not validate the coding with third parties and/or the research participants, I did refer back to the participants and other organisational stakeholders regularly with the key themes that had emerged so far to check and validate them. Once the first phase of the analysis had been completed, I also presented the initial findings back to the participants, again to check that what it made sense to them and represented their experiences (Gabriel, 2018a). This movement from analysis to fieldwork is typified by this quote from van Hulst and Ybema (2020), "Our analysis took an iterative, abductive form in which one travels back and forth between research activities in the field, analysis and the literature" (p. 372.)

I continued to do move back and forth from the analysis throughout the phases of the analysis process to test the themes that I had identified, both with the participants and with other organisational stakeholders. At each stage, there was agreement that

the themes were representative of the discussions that had taken place and also with the broader context of the organisation.

Given the nature of this research, with data being gathered through interviews and action research groups, it must also be recognised that the views given by the participants represent the reality for them in that particular moment (Silverman, 2013) and that each participant will have their own reality, which may or not be the same as the views of other participants. It was interesting to see the degree of commonality in views though between interview participants and the action research groups which has led to the key themes of this research. Gioia et al (2010) also highlight the risk of participants incorrectly recalling events from the past and recommend using additional real time data sources as a means by which to corroborate the outcomes of the interviews and action research groups. In this research, the findings and themes were reviewed and discussed with multiple individuals within the organisation to attempt to corroborate them as far as possible (Gioia et al., 2010).

7.5   Ideas for further study

Bushe (2011) provides a critique of appreciative inquiry stating that it can repress negative experiences and that to create real change, all areas of the employee experience must be understood. However, some really negative aspects of day to day work at UK Mutual did emerge from the action research groups so I would argue that appreciative inquiry can be used to focus on all aspects of working life. As an

extension to this research it would be interesting to spend a longer time in an organisation (or to return to UK Mutual) to use appreciative inquiry over a period of time to see whether the stories that I gathered through this research were typical of similar research elsewhere. This would suggest that appreciative inquiry is a means to gather the full experience of employees, not just the positive ones. In this thesis, I have argued that a more reflective approach to change is necessary in organisations. Czarniawska (2016) also suggests that more reflection and reflexivity would be useful in organisations, not just during periods of change. Therefore, there are opportunities to develop my conclusions further and investigate how increasing levels of reflection in organisations during change programmes impacts on change success. Through further research, it may be possible to determine the ideal mix of reflective activities to enhance change programme success.

There are also a number of other areas of organisation change that would be interesting to investigate using the methods developed in this research. For example, Gigliotti et al (2019) found a link between employee trust and feelings of being supported in the organisation and change success. The feelings of trust and support within UK Mutual experienced by the participants was not something that I specifically investigated but the findings of this research did suggest that the participants of the action research groups found the groups to be a supportive and sense making experience. It would be interesting to undertake further research to determine if undertaking action research groups during change programmes could contribute to employee trust. A key aspect of trust is for employees to feel that they have been given the opportunity for their views to be heard and to participate in any

change programme (Gigliotti et al., 2019). The participants in the action research group had very positive feelings about being involved and felt that the group gave them an opportunity to make sense of their feelings about change and about UK Mutual as an employer. Perhaps a similar programme of work could be a useful supporting mechanism in organisations (Gigliotti et al., 2019) as a means to obtain, share and use employee feedback and to create enhanced levels of trust during a change programme. A future piece of research could focus on different groups within an organisation undergoing change. Each group could undertake different types of group activity (or no group activity) and then levels of trust and organisation support could be measured in each group, as in Gigliotti et al (2019). This form of research would provide a useful illustration of the impact of these action research groups on employee views and thus on the likelihood of change success. Example research questions that could be answered from this research would be:

- What impact do employee action research groups have on levels of trust and feelings of support during periods of change?
- What type of employee change participation activities are most effective at increasing feelings of trust and support during change?

Another interesting area to consider to extend this research would be to focus on resistance to change more specifically. Vos and Rupert (2018) argue that much of the existing literature about change resistance focuses on the action of the resistor, usually as seen by others such as change agents. In my own research, any change resistance was seen to be separate from the research participants and carried out by

other individuals within the organisation. It would be interesting to conduct research to investigate the views of individuals who are seen to be (or who self identify) as change resistors. As much of the change resistance in organisations is hidden (Fronda and Moriceau, 2008; Ybema, 2014), moving away from interview based studies to more informal interactions such as regular action research groups, represents an opportunity to gather more of the small stories in organisations that can really impact on change (Whittle, Mueller and Mangan, 2009; Clifton, 2014) and can help researchers to understand what lies beneath individual acts of resistance. Such research may also unearth some hidden types of resistant acts. Mumby et al (2017) highlight how resistance should be viewed as an entirely appropriate reaction to a specific organisational context and thus, undertaking research using action research groups would enable change resistance to be understood in more detail.

Similarly, Vos and Rupert (2018) also highlight how to date, research has not focussed on what could be done by change agents to reduce levels of resistance. Resistance to change is often seen as the actions of a few individuals who are irrational or who are lacking in motivation (Sturdy and Grey, 2003; Mumby et al., 2017). However, as argued above, change resistance is necessary and can be helpful. If change agents were able to utilise the methods developed in this research, they may be able to improve change outcomes by understanding more about how and why resistance occurs and what actions can be taken to reduce reistance to change.

Example research questions that could be answered in this research would be:

- What are the types of change resistant activity in this organisation?

- What are the underlying causes of change resistant activity in this organisation?

- What can be done to reduce change resistance?

This research provides additions to existing change theory as well as suggestions and ideas for future practice in the area of change consulting. There are also interesting questions and directions for future research, as outlined above. By taking these conclusions and recommendations further into other research, it will be possible to investigate the archaeology of stories in other organisations and settings.

8 Appendices

Appendix 1 – Semi structured interview script

Thank you for giving your time to be interviewed as part of my research.

The interviews are being used to gather information from people within UK Mutual to enable me to investigate how change is managed and what people think about it.

As you are aware, all information gathered during the interview will be anonymous. It is being digitally recorded and you will be assigned an alias that only I will know. The interview will be transcribed for later analysis and you will be asked to review and agree the transcript. At this point, the recording will be deleted.

The research has been authorised as ethical by the Birmingham Business School's Ethics Committee.

You have previously agreed to participate in this research and have signed the consent form prior to attending the interview. Can you please confirm that you are still happy to continue?

As explained previously, today we will run through a number of questions which aim to gather your views about change at UK Mutual. The interview will take no longer than 1.5 hours and you are free to stop the interview at any time for a break. You are also free to ask questions for clarification throughout the interview. If for any reason you wish to withdraw from this research at any time, you are free to do so.

We will start with a few questions about you and then move onto questions about change and what it is like to work at UK Mutual. I may ask you some prompt questions from time to time but I will be asking you very open questions as I am interested in you and your work and understanding your experiences of change at UK Mutual. Therefore, I won't prompt you to answer in a particular way. I may take notes during our interview but mostly I will be focusing on your answers.

Before we begin, do you have any questions?

[Answer any questions.]

OK, are you ready to start?

Career and work:

1. What is your name and job title?

2. How long have you worked at UK Mutual?

3. What do you like most about working for UK Mutual?

4. Can you describe a typical day at work?

UK Mutual as an organisation:

5. How would you describe UK Mutual to someone who doesn't work there?

6. How do you think customers perceive UK Mutual?

7. What is it like to work at UK Mutual right now?

8. What has been your best experience at work at UK Mutual?

Change at UK Mutual:

9. How do you think UK Mutual deals with change?

10. Can you tell me about the biggest change that has taken place whilst you have been working at UK Mutual?

   a. How did you feel about this change when it first started?
   b. What about now?
   c. Did others feel differently to you?
   d. How was the change communicated? What were the key messages?

11. What has been the most recent change that has taken place? **[only use if answer to question 10 was a long time in the past]**

   e. How did you feel about this change at the time?
   f. What about now?
   g. Did others feel differently to you?
   h. How was the change communicated? What were the key messages?

12. Can you tell me about any people/roles in the organisation that are very influential in how change is managed?

13. Can you describe how the leadership of UK Mutual manage change? **[only use if answer to question 12 was not about leaders]**

14. Is there anyone else that you think I should speak to as part of this research?

15. Are there any particular documents that I should look at which would help me to understand more about UK Mutual? Can you share those with me?

Floating prompts:

1. What do you mean by that?

2. Can you clarify …?

3. Probe using interviewees own language

Thank you so much for your time. That is the end of the interview. Do you have any questions?

You will receive a transcript of the interview to review and finalise.

Appendix 2 – Action research group agendas

Session number	Key topics discussed
1	**What is it like to work here right now?** • What has been your best experience in this organisation? • What is it like to work here right now? **What was it like to join UK Mutual?** • What did you know about UK Mutual before you joined the organisation? • What activities did you take part in when you joined (induction etc)? • Did these activities make you feel part of UK Mutual? How? **What do you feel about working at UK Mutual now?** • How have your views changed about UK Mutual since you joined? • What stories have you heard about UK Mutual? • How have these stories influenced you? **Homework** :Make a note of any stories that you hear about UK Mutual until we meet next (positive and negative).
2	• What stories have your heard about change at UK Mutual, relating to either past, current or future change? • What stories about the past/history of UK Mutual did you hear when you first joined that helped you to understand what the organisation was like?

Session number	Key topics discussed
	• Do you think there is a difference between the public and private 'face' of UK Mutual and if so, what is the difference? • What experience at work really made you feel a part of the organisation? • What are your dreams for UK Mutual in the future? **Homework**: Gather images that: 1. Illustrate how you feel about working at UK Mutual. These can be within the organisation or outside of it – photos, drawings etc 2. Illustrate what you think the future is for UK Mutual
3	• What is your experience of dealing with politics at UK Mutual? • Are there any people in the organisation that you see as particular role models? You don't have to name them but what are the characteristics that you particularly admire? • Are there any other organisations that you particularly admire? • What do you think has been the impact of the financial crisis on UK Mutual? • Are there any aspects of change that you would particularly like to discuss in this group? • What wishes do you have for next time? **Homework**: Imagine the best possible future for UK Mutual and write a story about it. (inspired by Watkins, Mohr and Kelly (2011)

Session number	Key topics discussed
4	• Thinking back over your time at UK Mutual, what has happened here that was most interesting from your perspective? (adapted from McCarthy, 2008) • Describe an incident that you have witnessed which captures the nature of your experience of UK Mutual? • How did you feel about it at the time? • How do you feel about it now? **Homework**: How have you/the organisation changed since the beginning of the study?
5	• How have you/the organisation changed since the beginning of the study? • What have you learned through attending the focus groups? • Compare feelings of group to how they felt at the last meeting. Many complained that they felt negative/less buoyant because of the amount of change • How has your perception of your place in the organisation changed over time? (new vs. old) • What are your top three priorities for the future of the organisation?

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