# Organizational learning and the leadership skill of time travel

Thomas N. Gilmore

*Centre for Applied Research and The Wharton School, University of Pennsylvania, USA and*

Gregory P. Shea

*Shea & Associates and The Wharton School, University of Pennsylvania, USA*

Leaders help organizations perceive possible futures (through the lens of past experiences) to make intelligent decisions in the present. As Whitehead[1, p. 3] has written: "The present is all that there is. It is holy ground; for it is the past, and it is the future." However, with the turbulence surrounding and invading organizations, this "holy ground" is increasingly being experienced as overwhelming, chaotic and anxiety filled. The very boundaries of organizations and industries are being significantly reshaped, calling into question the identity of the organizational entity that is being challenged to "learn" from its experience. For example, consider aerospace managers adapting to a new geopolitical world in the waning years of the cold war. Working with fast-changing emergent technologies, the organizational context shifted from RCA to GE, to Martin Marietta, to Lockheed, all within the space of a decade. Is it any wonder as the turbulence increases that individuals become less identified with the largest systems – the company, the division, etc. – and begin to focus on the project or their own job.

In addition to confusions about "who" is learning, the processes of learning from one's experience may be both too slow and too embedded in rapidly obsolescing frameworks. Like the proverbial generals fighting the last war, leaders risk extracting the right lessons but needing to apply them in a dramatically altered situation. Paradoxically, we need the capability to see into the future when conditions make it difficult to do so.

With the increased pace of change, in addition to losing our bearings about where we are, we may be losing our sense of location in time. In response, people increasingly flee the present, either to nostalgic wishes for an idealized past or to a simplistic, ideologically driven future. Emery and Trist have explicated the maladaptive defences against turbulence as segmentation, superficiality and dissociation. They describe these mechanisms as follows:

(1) They are mutually facilitating defences, not mutually exclusive.

(2) They all tend to fragment the spatial and temporal connectedness of larger social fields and focus further adaptive efforts on the localized here and now.

(3) They all tend to sap the energies that are available to and can be mobilized by the larger systems and otherwise to reduce adaptiveness[2, p. 66].

Effective leaders need to help followers link past and future in present actions, even as those connections seem frail or ruptured. Rather than fight this flight from the muddle of the present, leaders can powerfully harness these journeys forward or back in time, in the service of reaching thoughtful, high-quality decisions in the present. This is the skill of time travel that we increasingly see as critical to effective leadership. This article addresses the dilemmas of organizational learning under such conditions of rapid change. We first present a process to revisit the past of the organization to bring forward the essential elements that enable people to feel some sense of continuity amid the significant change. We next look at detecting the emergent future in the present. We conclude with a discussion of "histories of the future" that involves imagining some vantage point in the future and contrasting an interesting and plausible narrative of the journey from the present to that point. All of these processes help an organization become oriented in time and focused on the important aspects of their experience.

## Accessing the past

The past is often a source of "dynamic conservatism"[3,4] that prevents people from seeing new realities. It is no accident that innovation most often comes outside of the existing institutional structures, from the margins and from the marginals. To hold roles inside "the establishment" is often to have a trained incapacity to see novelty. However, the sense of the past as only a source of inertia or conservatism masks how aspects of the past are critical sources of both learning and identity. Ironically, as the rate of change increases, focusing attention on that which endures is critical. It is no accident that the pioneering work by Trist *et al.*[5] about underground coal mining is subtitled "The loss, rediscovery and transformation of a work tradition". Older miners recalled self-managing groups before mechanization had destroyed that social system and reinvented it to fit with new imperatives.

Increasingly, the challenge in organizations is not the management of information, which is often overwhelming and contradictory, but it is the elucidation of meaning from that information. Making sense of something is not a purely cognitive process, rather it involves deep emotional connections and reactions to situations. The filters of the mind screen and recast what we "see" including what we see in our storehouse of what we have seen, namely our memory.

Turbulent times push human sense-making capacity to and beyond its limits, continually providing overwhelming stimuli that threaten whatever sense we have made previously. Leaders face choices: What to affirm amid such

times? What to transform? What to cherish? What to forsake? How to balance opportunity and change with coherence and continuity of time and of meaning?

Leaders help followers separate essence from form and help people let go of obsolete forms. Such work bonds leader and follower through respect for a shared tradition (whatever it may be) and a lightening of the load to create space for new challenges. Distillation is a collective, interactive process whereby leaders and followers invest some smaller than the whole aspect of their collective past with special significance.

The first task of distillation entails clarifying what has characterized the experience of the organization. What are the creation myths? What count as shaping events? What stories persist as folklore? What stated values have come and gone and which have lasted? What moments do members recall when asked to recount when they felt the greatest pride in belonging to this organization? When did members feel most alienated from the collective or most ashamed of their membership in it?[6].

The answers to these questions provide the essence of what organizational members most value about the past – for better and for worse. Here lies the essence, beyond simple nostalgia or regret, of the filters that members use to see their past. Their vision most likely confounds form and essence (e.g. the love of a room with the excellence of the work performed within it or the disdain for a department with the policy that so offended). The leader must separate the two. The leader must distil from the past what gives it meaning.

In a sense this is the creation of "transitional objects" or transitional spaces that can serve to help people negotiate a difficult transition[7]. Just as a teddy bear bridges between dependence and autonomy for a small child, so too do we need analogous links to help with many of the organizational changes that we face.

Note the links to the issues of mourning – letting go of positive aspects that will not be present in the future. All too frequently, when we are at some point of transition, we flee via idealization or contempt, labelling it as all bad or all good without working through both the positive and negative aspects. Bridges[8] has rightly noted the importance of letting go before people can sign up emotionally to significant change. The concept of distillation has embedded in it the idea of shedding bulkier aspects that do not have value in order to travel more lightly.

Berlin characterizes Churchill's genius as being rooted in his strong sense of the past, in contrast to Roosevelt's skill at apprehending an emerging future.

> The clear, brightly colored vision of history … is the exhaustible source from which he[Churchill] draws the primary stuff out of which his universe is so solidly built … He saved the future by interpreting the present in terms of a vision of the past which did not distort or inhibit the historical development of the British people by attempting to make them realize some impossible and unattainable splendor in the name of an imaginary tradition or of an infallible, supernatural leader[9, pp. 24-30].

**Discovering the future in the present**
Emery, the Australian sociologist and futurist, has argued that the future is with us in the present, but we are unable to recognize it because of the blinders that our current thinking creates[2]. The future often enters parasitically in a dominant system or on the edges, borrowing resources in a guise of not being threatening until it becomes strong enough to break out and have an identity of its own. Naisbitt[10] has also suggested that the future arrives unevenly. By this he means that certain places are the seed beds of innovation in any social system. For example, Minnesota has been a leading innovator in corrections – new ideas will appear, be tested and implemented there before other states. California has been in the lead in terms of the transformation of health care. Florida has been in the lead in geriatric services.

Von Hippel[11] of MIT has developed the concept of the lead user. A lead user would be someone who, because of technology or business imperatives, has a disproportionate stake in solving or working out some emergent issue. For example, in terms of counting sheets of paper accurately, banks were prepared to invest large sums of money to build that technology. Once that is done, other uses of paper-counting technology that do not need that level of accuracy or equipment sophistication come in behind the particular lead user of that application.

A leader should know what places are the seed beds or lead users for their particular substantive area and invest scanning resources in tracking these places. Furthermore, a leader can substantially increase the total available intelligence by enrolling others in the organization to be on the alert for these extremely specific issues, events or occasions that they feel carry some kind of implication, warning or opportunity to be explored for their own organizations. Often these vignettes are not inside one's own system but arise when one is in a different setting or taking up a different role. For example, people can have insights about an industry or an organization that is dissimilar from their own. People can be invited to bring these stories into the present deliberations about the organization's strategy. In a protected space, such as a workshop, participants can discuss the implications of each, particularly the potential crosslinks among the items. Here individuals can learn from one another by adding perspectives to examples that others might have brought and by examining patterns among the items.

At a recent session that was looking at changes in work patterns, one person brought in an article from the *New York Times* that described a new setting for the IBM sales and marketing group in New Jersey[12]. They had shut down their four regional offices that were plush, well appointed and up-market – in the grand IBM tradition – and moved the entire state-wide salesforce to a single industrial warehouse setting. No partition was higher than three feet, and desks were assigned by punching in and receiving a number when you arrived. The rationale was to reduce facility costs by 70 per cent as well as drive the sales and marketing force out of the "nest" and get them onto the customer's premises selling services and IBM products. The article mentioned a wall that

had been created with symbolic objects of people's past personalized desks and offices. Note that this process moves from a concrete case versus starting with an abstract idea about "the virtual office" or people working at home. This helps a group to think vividly about the workgroup of the future, the physical setting of that workgroup and the issues that are going to need to be managed. For example, in this discussion a participant speculated about what these people's cars looked like, hypothesizing that the car might become both a place suffused with personal identity as well as with increased office technology. This led someone to tell of an insurance company that put a computer, fax and check printer in mobile adjusters' cars so that they could complete a service with a customer on-site in a single session. This is exactly the kind of textured, linked thinking that makes the organization more intelligent at worrying about and managing towards its future. The specificity of the stories helps people integrate both thoughts and emotions about these trends.

This method of inviting people to bring particular experiences has another important effect: it shares the work of worrying about the future[13]. All too often the organization comes to feel the leader's constant message about necessary future changes as an attack on them and their past. In turn, they blame the leader as the messenger for these reality-based threats from the external environment. By deepening the participation and spreading the work of worry about the emergent future and by deputizing people to scan for thought-provoking signals of worlds in emergence, one can dramatically change the dynamic and democratize the challenge of sorting trends which are irrelevant and those which are likely to mature into genuine opportunities or threats for the organization.

**Exploring histories of the future**
Vivid histories of the future enable people to construct rich narratives, to look at imagined actions – mistakes, successes, moves, countermoves – in the context of threats and opportunities in the wider environment. Then they can step back and connect present choice points to these possible futures. This method stems from a simple finding: when people are asked to think in the past tense instead of the future, they develop richer, more vivid, textured stories[14]. Therefore, a leader is advised to leap with his or her people out to some imagined future time and event and invite people to share stories of the journey to that point through a "history of the future".

The process unfolds as follows:

(1) Assemble an interested and diverse group of stakeholders.

(2) Set a specific occasion and time horizon, such as a professional meeting five years hence aimed at learning about innovation or organizational strategy, or a panel discussion for a tough business school class. It often helps to have people anchor the chosen time horizon in their own lives. For example, if five years is chosen, how old will they be and what will be some personal milestones in that year (e.g. child graduates from high

school, parents' fiftieth anniversary, etc.)? This simple device of having people connect up a time line to their personal biography is powerful. When doing a history of the future of the pharmaceutical industry, one individual humorously reported that when he figured out in 2002 his last child would leave home for college, he realized that he wanted to leave his wife then.

(3) Give each participant time to think about some of the elements in their imagined story. People can be asked to write a scenario in advance. Also, people can be assigned different types of stories, such as significant growth, merger, dissolution, or developmental or regressive options.

(4) Select two or three people as panellists and one or two inquirers (such as investigative reporters, case writers, company historians).

(5) Set the stage by inviting the panellists to describe the physical setting and help themselves and others mentally travel to a future time and place. State the ground rule that people must use the past tense; when asked a question that they had not thought about, they should simply make up an answer on the spot (the more specific the better). If a fellow panellist makes a statement, others are obligated to build on it like improvizational theatre rather than sticking to the storyline that he or she may have thought up during the quiet time. This is a critical feature because it requires that the panel react spontaneously – in the here and now – to one another's contributions in a collaborative way. This interactive collaboration is similar to the real process whereby organizations over longer time periods mix intended and emergent actions to result in a realized strategy[15]. Then begin the discussion.

The inquirers should intervene early to keep it from devolving into a presentation by one member. The aim is to have a rich, interactive conversation that strikes a good balance between predictability and surprise[16]. Often the most effective interventions for those who are inquiring is to get the panellists interacting and building on one another's thinking. Some useful guidelines for the inquirers:

- Request specificity, e.g. names of people, placed, dates, etc.
- Ask what happened in terms of relevant external events, such as a key election, new technologies, significant mergers in the industry, etc.
- Ask about surprises or counter examples. For example, if the respondent is talking about resistors, ask who the strongest supporters were and what they did.
- Ask questions that encourage a storytelling response.
- Explore linkages with panellists' personal lives, such as career shifts, children graduating, etc.

- Invite panellists to interact with each other or explore differences in their feelings about some of the events described.

After a reasonable story gets played out, the group can stop and process the themes and discuss how people felt during the twists and turns. Because of the ground rules that each has to follow to build on one another's lead, the collective product is almost always a surprise to any one participant – just as the future is always a surprise and is never solely created by our own actions. In these encounters, people can connect with feeling angry, mobilized, defeated and/or delighted as the story unfolds and then draw on that emotional energy in rethinking the approach.

At this point, all participants can discuss issues that emerged in the conversation and similarities and differences with what they had thought about during the preparation and while listening. People can repeat the process with a different storyline or explore branches of the narrative from which the first iteration surfaced.

Simply doing this type of playful thinking helps develop the organizational learning capacity to make sense of what is going on in a fast-changing environment. Just because we have shifted from scripted types of strategic planning to more improvizational thinking does not mean there is no way to prepare. As one faces a more contingent, faster-changing world, one actually needs to spend more time "preparing", but the preparation needs to be more flexibly linked to the future. No longer is the output a specific plan, but rather it has become insights about the option set, some sense of the stakeholder dynamics surrounding the issue and a deeper appreciation of the affective aspects of the choices.

This process can be used as part of formulating a strategy in some area of the business. It can also be used in many other settings as particular decisions and their future consequences are in play. For example, a top hospital team was using Mitroff and Pearson's[17] crisis preparedness work and had created a standing crisis team to identify potential crises and prepare possible responses. The team was working through a potential labour action of nurses in response to a merger. When they were discussing this issue purely analytically, there was little engagement or fresh insights. However, when they were placed into the future, on a specific date after the merger had taken place and given an emerging scenario, they immediately began to learn from real interactions in the room. The first insight was that the CEO and two other top executives were going to be out of town at a conference on the date that they happened to pick. Thus the simulation immediately plunged the group into quickly figuring out who would be in charge and what would be the first line of response. When would the CEO get called, would he return or would he want to enact handling it in a "normal" fashion? In enacting a press conference, a spokesperson said that people who were absent without excuse would be treated according to the standard policies. It was then realized that because of the merger, they were not clear on whether the policies were the same for the two organizations. The

vividness substantially increased the learning for the team because it was not simply analytical reconnaissance of the future but projecting forward to imagine actually interacting in the situation.

This process is valuable particularly when people are pulled in multiple directions and have difficulty in coming to know their own mind. As E.M. Forster says, "how do I know what I think, until I hear what I say". The playfulness can help people try out different imagined futures and see how they feel. It resembles the process of reaching a decision by flipping a coin, ignoring the result and listening to one's gut feel about what one really wanted to do. It is similarly valuable when there are considerable politics in exploring alternative futures. For example, in a recent application with a family practice group of physicians exploring some closer relationship with a large, integrated regional health care system, the method allowed both sides to float trial balloons about different aspects of the future without being committed to them.

Another feature of the method is that it helps complement analytic work that has many facts and forecasts but has not asked people to imagine living in the world that they are forecasting or creating. In working with histories of the future we have seen a significant shift when people get into imagining that events have actually happened. People often need to ask what was real and what was made up. People report that they go from seeing events abstractly, as a spectator, to feeling actually in the moment.

Eisenhardt[18], in her empirical studies of strategic speed, finds that effective top teams have many of the features that we have noted. They tend to use real operating data, like an internist, looking at interrelationships and patterns rather than abstract planning forecasts. They work up multiple, even conflicting, options at the same time, often learning faster from the comparisons rather than against some stable set of criteria. They even begin implementing several options, again potentially contradictory, but placing an affirmative value on the hedge against fast-changing events to be able to switch as needed to a different approach.

To summarize, the value of the histories of the future is that they help people sort out timing sequences. They help people give advice to one another and complement technical work with some of the inevitable role of serendipity and politics in an emerging future. They link the head and the heart as we confront alternative futures.

**Conclusion**
We have looked at how leaders can travel into the past to identify and pull forward essential aspects to the organization's continued identity. In the present, leaders need to encourage followers to be vigilant for the immanent future. We have set forth both the method and power of travelling to some future time and constructing a plausible narrative to link up the present with that future. All these journeys are in the service of people in the present being able to make high quality, committed choices that work with the complexity rather than flee it.

Using the guiding stars of time – past, present and future – helps. An exclusionary focus on the past guides a leader to deny the lessons of the day and the implications for tomorrow. Effort pours into an attempt to forestall time, to travel backwards, to convert today into yesterday. This is the opposite of distillation. Similarly, the leader who steers only by the future risks disassociating from the temporal stream that gives continuity to an organization's identity. Such a leader may craft an ingenious vision but for the wrong time or, more painful yet, for the wrong followers. To lose contact with the past, especially a collective's past, is to close one's self off to learning what must go and what must stay, to learning what to distil. Losing contact with the present means losing the reality testing that only the present can provide.

Yourcenar brilliantly captures the leader's need to weave effectively the past, present and future as she has the Emperor Hadrian reflect as follows:

> Even in my innovations I liked to feel that I was, above all, a continuator … I looked, for example, to those twelve Caesars so mistreated by Suetonius: the clearsightedness of Tiberius, without his harshness; the learning of Claudius, without his weakness; … it devolved upon me, to choose hereafter from among their acts what should be continued, consolidating the best things, correcting the worst, until the day when other men, either more or less qualified than I, but charged with equal responsibility, would undertake to review my acts likewise[19, p. 167].

In conclusion, the role of the leader is to help others worry about possible futures in a constructive way that enables people to connect their fears and passions to alternative futures. Steven Ross[20], the builder of Time Warner, told the story of being summoned at the age of 16 to his father's death bed to learn that his sole inheritance consisted only of advice. His father said to him, "There are those who work all day, and there are those who dream all day, and those who spend an hour daydreaming before setting to work to fulfil those dreams. Go into the third category because there's virtually no competition"[20, p. 12]. We would agree that too often people are caught up in the incredible "busy-ness" of today's organizations to the point of being unable to step back, ask what it all means and focus on what is important. Conversely, in reaction to the "busy-ness", sometimes people simply check out and go into the daydreaming category. We think there are a variety of ways for a leader to link dreaming and reality through exploring the past, present and future, both rationally and emotionally.

In a sense, exploring the future resembles a treasure map that has been torn up and distributed across time to various people at different positions, levels and functions within the organization. The leader's task is to bring people together to discuss and assemble these bits of the treasure map so that they can set a path and face the threats and opportunities that lie along the journey.

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