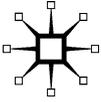


## **ORGANIZATIONAL LEARNING**

**Organizational Learning**  
**How Companies and Institutions**  
**Manage and Apply Knowledge**

Jerry L. Wellman

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ORGANIZATIONAL LEARNING

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## Preface

The core idea for the constructs described in this book first emerged in coherent form when I was given two hours to prepare a half-hour lecture on a new topic. The point of the exercise was to critique my presentation skills and the subject matter itself was relatively unimportant to the review panel. Such circumstances can foster either chaos or clarity. What emerged was a new perspective about a topic that had been bothering me for some time. The work for that presentation exercise led me to a series of assertions and a presentation titled “A Few Lessons Learned about Lessons Learned.”

Two streams of thought led me to develop the model outlined in that presentation, a model for understanding how organizations handle knowledge. First, I had recently been frustrated about shortcomings in the way the organization I was leading at the time dealt with a couple of challenges. In one instance the organization seemed to have repeated a past mistake, apparently failing to have applied what we had already learned. In another instance the organization appeared to have misapplied some past learning to a new situation. Both instances cost us a great deal of money and dissatisfied important customers. Second, I had recently read *Knowledge in Organizations* (Prusak, 1997), a collection of papers about how organizations deal with what they know. The book brought together perspectives and insights from several academics who had studied the topic. Some of those researchers offered insights and perspectives that resonated with my own experiences, both recent and in the past. Others appeared to be either too narrowly focused or too abstract to be useful to leaders, like me at the time, dealing with real-world organizational learning challenges.

The model and assertions I put together for that presentation, and the continuing frustrations in my own organization, led me to think more deeply about the topic. I delved more deeply into the literature, becoming both enlightened and frustrated. I also thought

more deeply about how well or poorly the organizations around me were handling their knowledge. Competitors, suppliers, and sister-businesses within our corporation were struggling with the same challenges. It also prompted me to continue testing the model and assertions against the research, what I had experienced in the past, and what I observed now.

A couple of years later that work matured into a paper published in the *Organization Development Journal* (Wellman, 2007). The response to the paper in turn prompted the work on this book.

I began asking myself several questions: Just how do organizations recognize and capture the valuable lessons they learn? How are those lessons retrieved when needed? Do some old and now irrelevant or disruptive lessons learned still linger within the organization long after they are useful? Or has their usefulness been overlooked? In short, just what lessons have we learned about how organizations capture, store, and retrieve what they learn? Hopefully, this book sheds some additional light on the answers.

### **A Note on Terminology Used in this Book**

The reader should note that four words/phrases (*Culture*, *Archives*, *Old Pros*, and *Process*) are being used as terms-of-art if you will for a collection of organizational behaviors, attitudes, and biases. Yet, the same words are also by necessity occasionally used in the text for their more traditional meaning. For example, I describe different types of archives (the traditional usage) such as logbooks, data files, test results, and the like, but I also use the word *Archive* to describe the organization's overall approach to capturing, formatting, and storing its knowledge as one of the four ways the organization deals with what it knows. Thus *Archive* is a meta-concept while "archive" appears with its traditional meaning. I have worked hard to find alternative words for the traditional meaning of these four words. I have attempted to manipulate the sentences to avoid their traditional usage. I have tried having them appear in their traditional and their "meta" context without using italics or capital letters to distinguish the two usages. None satisfied the need. The reader is asked to keep in mind the distinction.

### **References**

Wellman, J.L. (2007). Lessons learned about lessons learned. *Organization Development Journal* 25(3): 7.

Organizations capture and deploy what they have learned in one of four ways: *Culture*, *Old Pros*, *Archives*, and *Processes*. This paper describes the four approaches, their strengths and shortcomings, and their interactions. Along the way, it offers guidance and perspective to assist a management team striving to build more effective organizational learning competence.

Prusak, L. (1997). *Knowledge in organizations*. Boston, Butterworth-Heinemann.

This collection of papers gathers perspectives on organizational knowledge management from the information technology, organization theory, and leadership perspectives among others.

## Acknowledgments

A crusty old vice president for whom I worked many years ago was fond of saying there is no new learning in this world, only remembering and reminding. It may be that this book found its genesis in Bill Poe's perspective. His admonition left its mark on my own worldview and in turn influenced how I chose to interpret what went on around me. Of course I also recall him once writing in my performance appraisal that I was too often pedantic—by that he meant I was a person who asserted to know more than his experience would warrant. I hope this book convinces Bill I've finally grown into my britches as it were.

Years later, my Ph.D. advisor Bob Silverman provided the gentle guidance and encouragement that led me to understand information systems to be much more a social and cultural notion than a process and technology notion. He steered me toward Prusak, Davenport, Stinchcombe, and others whose work shaped my understanding of how organizations deal with what they learn.

Those influences swirled in a lively stew out of which arose the perspective described here. No doubt I have unconsciously adopted as my own original notions thoughts that I learned, read, or inferred from others. For that I apologize. No doubt I have, albeit unintentionally, distorted or taken out of their intended context thoughts I have attributed to others, and for that also I apologize.

This was my first attempt at writing a book. Had I known beforehand what was involved, I might well not have begun the journey. Chris Chappell, Laurie Harting, and Emma Hamilton at Palgrave Macmillan and Maran Elancheran at Newgen helped me survive the experience and no doubt made it much easier than I could ever know.

Most importantly, to Barbara my wife and Adam my son, I appreciate deeply your patience and tolerance while I worked on this book over the past year. You indulged me more than I had any right to expect. Thank you both.