The mountaintop and the swamp;

the role of time in the practising of change

commitments after a customised executive

education programme

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(Document I of III)

Preface

- This thesis is the result of my own work and includes nothing which is the outcome of work done in collaboration except as declared in the Preface and specified in the text.

- It is not substantially the same as any that I have submitted, or, is being concurrently submitted for a degree or diploma or other qualification at the University of Cambridge or any other University or similar institution except as declared in the Preface and specified in the text. I further state that no substantial part of my thesis has already been submitted, or, is being concurrently submitted for any such degree, diploma or other qualification at the University of Cambridge or any other University or similar institution except as declared in the Preface and specified in the text.

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Abstract

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Barry Michael Rogers

There is little understanding of what happens to change commitments after formal learning programmes. Schön's metaphor of the *mountaintop* and the *swamp* appears helpful in seeing this setting through a different lens. Building on the ontological distinction provided from either perspective, this study highlights the temporal experiences of putting knowledge to work after formal learning programmes. It explores the role of time in practising change commitments as well as the development of an intervention - a temporal visualization tool - to facilitate the practising of commitments.

A process tracing approach supported the development and evolution of the visualisation tool over 5 years as well as its use, evaluation and impact. Informed by a social psychological stance, five dimensions of temporality, incorporated within a recontextualisation framework, were core to data capture, analysis and representation.

The findings suggested a steep initial fall-off in practising after a highly-regarded customized programme. Use of the tool improved practising over a variety of measurement criteria and generated a range of practical impacts. The findings further suggested a role for temporal stages, norma-temporal practices, contradictions and interactional expectations in 'crowding out' the practising of change commitments. They also appeared to support greater explicit recognition of temporality within the processes of recontextualisation. A range of limitations, particularly surrounding a narrow conceptualisation of the individual, challenged the headline findings and results of the study. Ultimately greater appreciation of time, process and recontexualisation would appear helpful in addressing the persistent issue of putting knowledge to work from a theoretical and a practice perspective.

Key words:

Post-programme, practising, recontextualisation, time, visualization, process, norma-temporality.

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Barry M. Rogers,
October 2020.

The three Paper format

This study was driven by the dual considerations of understanding and use, and how these considerations relate to one another, in and across theory and practice. While these might appear abstract considerations they are rooted in a persistent problem within my field of practice – the post-programme application of change commitments.

The study is presented as three separate papers that aim to form a connected, overall account. The first Paper sets the scene, as well the approach taken, to address greater understanding and use of the underlying problem. Building on this, the second Paper outlines the evolution of a practical tool that sought to be useful in addressing this problem, but also required increasing levels of understanding to achieve that use. Paper Three explores the on-going interaction of understanding and use as the tool was employed and considers the wider impact and implications of the findings.

The activities underpinning this research often represented very different stages, experiences and logics. It was decided therefore to divide the presentation of the study into three parts in an attempt to do justice to the chronology, development and flow of the underlying account. This format had many of its own challenges but ultimately felt the most appropriate form of presentation.

Paper I

Background to understanding and use

Paper I of III

Barry M. Rogers

The mountaintop and the swamp; the role of time in the practising of change commitments after a customised executive education programme

Overview of Paper I

The first Paper is divided into five chapters. These chapters aim to provide the background and context to the study. The ultimate intention of the Paper is to build the case supporting the logic and approach of Chapter Five - the process methodology employed in the research. This process approach informs a way of seeing the unfolding nature of the post-programme context, the individual that inhabits that context and the development and use of a tool to navigate the context.

Chapter One explores the nature of the 'problem' and the route travelled to this EdD. It also outlines the approach taken by the study, including the overriding research questions. Chapter Two describes the research setting as well as its key constituents. It highlights the complex nature of the problem that the learning programme underpinning the study sought to address and crucially, how the nature of learning was conceptualised in this setting. Here we encounter the first significant interplay of understanding and use. I suggest that the frame of understanding within this setting, and more generally in my field of practice, has serious consequences for the visibility of issues in the post-programme context. I explore this critical faultline - the transfer of training - in Chapter Three and paint an initial picture of the post-programme context, a context defined by temporality and knowledges. Building on this, Chapter Four seeks to broaden the lens of understanding and sets up the discussion of a process methodology in Chapter Five.

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1.   The route to understanding and use

Buried within the first chapter of Donald Schön's seminal work on reflective practice is a metaphor about the 'mountaintop' and the 'swamp' (Schön, 1984). When navigating the mixed topography of professional practice, Schön suggests that there is a choice to be made at some point, a choice between the hard, high ground where clarity of technical understanding is possible and the swampy lowlands where tangled messiness dominates the terrain. Two quotes from the passage nicely illuminate this distinction.

'There are those who choose the swampy lowlands. They deliberately involve themselves in messy but crucially important problems and, when asked to describe their methods of enquiry, they speak of experience, trial and error, intuition, and muddling through.

Other professionals opt for the high ground. Hungry for technical rigour, devoted to an image of solid professional competence, or fearful of entering a world in which they do not know what they are doing, they choose to confine themselves to a narrowly technical space'

(Schön, 1984, p. 42 & 43)

After reading these for the first time I found it difficult to shake off the underlying images. They appeared to capture the essence of a longstanding dilemma in my field of practice, a choice that is often portrayed as a binary decision between rigour or relevance (Ghoshal, 2005; Van De Ven & Johnson, 2006). Intriguingly, they seemed to give me a way of talking about something deep and visceral that I had experienced but often found difficult to articulate (Astley & Zammuto, 1992). As an educator I had made a choice in my career to pitch my metaphorical camp half way up Schön's mountain – at a place where I could occasionally get a clear view but that also allowed

me easy access to the swamp, the everyday context of organisational life in which I spent most of my time. This was a middle space between these two domains.

The nature of these differing contexts, and the gap between them, underpins this study. Specifically, the study relates Schön's tale to the field of customised executive education and the challenges associated with putting formal knowledge to work in the swampy real-world conditions of the post-programme context. To start however I would like to briefly outline the nature of the problem behind this study and the route I have taken to exploring it in the form of this EdD.

1.1. Section I: A problem in my field of practice

For over 20 years I have lectured at the London School of Economics and Political Science where I teach a course on the Masters programme in Organizational and Social Psychology. Alongside this I also have a non-traditional educational role - I design and deliver customized executive educational experiences for commercial organizations (Anderson & van Wijk, 2010). These are usually short formal programmes aimed at the specific needs of a defined cohort within a particular organization (Tushman & O'Reilly III, 2007).

In general there is an issue I tend to witness at the end of programmes I lead inside organisations. No matter how 'successful' a particular programme has been (e.g. high evaluations from participants), I am taken by the speed at which these participants seem to be drawn back to the rigours of their working lives. In my role as a lead-faculty member I often (cheekily) suggest to participants that as soon as they walk out of the classroom, I can see them *actively forgetting* everything they have learnt during our time together. Being candid in this way seems to strike a cord – it invariably brings a guilty, knowing smile to their faces. Many of them, it would appear, have been in this position before: leaving a formal programme full of good intentions only to be get pulled back to their old ways after a short period. This is a feeling, I suspect, that most of us have experienced at some stage in our working lives.

This issue is part of a bigger problem surrounding the usefulness of formal programme knowledge within my field of practice (Faragher, 2016; Glaveski, 2019). The size of the market for workplace learning and training, the output of executive education, is substantial. In 2015 US corporations alone spent US$350 billion globally on employee training and development (Beer et al., 2016). Despite these substantial sums there is dissatisfaction from many, both inside and outside the field, with learning 'outcomes' (Bird & Cassell, 2016). By some estimates only 10% of the learning from formal programmes is sustained for any meaningful period beyond the classroom (Fitzpatrick, 2001). This situation is compounded by uncertainty and ambiguity surrounding the measurement of results. Most organizations only measure programme results at the level of immediate reactions e.g. 'happy sheets' (Murray, 2019), and very little measurement is carried out in terms of actual behaviour change and eventual outcomes in the workplace (Saks & Burke-Smalley, 2012; Sitzmann et al., 2008). Ultimately there is little evidence to support long-term change from formal programmes.

Over the years I have sought to better understand the challenges associated with the application of post-programme knowledge. Wearing my academic hat my first port of call was the existing literature. Surely I cannot be the first interested party to notice this issue? In reviewing the literatures it soon became clear that thousands of articles, journals and Special Issues had been devoted to the topic area (Sitzmann & Weinhardt, 2018). Within the field of applied psychology alone over 450 articles on training and development had been published in the flagship journal over the last 100 years (Bell et al., 2017). What was also clear was that the 'signature' research associated with the issue, the 'transfer of training' literature, had produced little in terms of significant breakthroughs (Ford et al., 2018). Furthermore, alternative literatures questioned the basic premise and legitimacy of any form of formal learning intervention in the first place (Lave & Wenger, 1991; Wenger, 1999). Whatever the perspective, it was notable that there was almost no consideration for what happens after a formal programme (Baldwin et al., 2017; Blume et al., 2010) - for some reason any meaningful understanding of this context had been written out of the texts.

1.1.1. Different knowledge(s) and realities?

The more I investigated this problem the more it became clear that there was an additional issue at play – something surrounding the types of knowledge that appeared to be relevant in different contexts. As my thinking developed, a special edition of the Academy of Management Journal seemed to capture this distinction between knowledges nicely (Rynes, 2007). The editors of the journal had made the standard plea to contributors for approaches and suggestions within the articles that could improve uptake and impact in practice. They noted however that the findings presented in the Issue bore little connection to the everyday life of practitioners, especially in terms of how they represented the reality of the workplace.

'The real-world of…managers is messy, complex and filled with human drama, making it unlikely that it can be completely understood using 'hands off' methodologies such as surveys and archival analyses'

(Editor's foreword. Rynes, 2007)

This distinction between seemingly differing realities made me wonder about the characteristics of the domain in which formal knowledge is normally generated and those domains where it is used and consumed (McIntyre, 2005; Vaill, 2007; Weick, 2005). Could it be that findings that are legitimately produced and presented in one context (and fit-for-purpose in that context) did not connect in a different context because different rules and dynamics applied? (Astley & Zammuto, 1992). Aspects of this resonated with my own experience. As an executive educator I tend to work closely with academics and practitioners from various fields in their role as faculty for the programmes I design and deliver. More often than not, if a 'star' academic or practitioner chooses to communicate according to her or his rules when seeking to connect with audiences outside of their field they tend to have issues (Markides, 2007). Far from a need to dumb down their content or just 'communicate more clearly' (Shapiro et al., 2007), the issue seems to lie in something more fundamental

- a different way that knowledge is valued and understood between the academic and practitioner realms (Langley, 2019; Langley et al., 2013; Tushman & O'Reilly III, 2007).

As I considered this distinction, I repeatedly found myself returning to the implications of Schön's parable (Schon, 1984). Often it felt that the requirements of quality research, located high on the mountaintop, meant that an issue under investigation needed to shake off the excess baggage of contextual detail and focus on the central theoretical or conceptual issue (Degama et al., 2019; McLaren & Durepos, 2019). This raised an issue however - it appeared that it was this very detail, the background contextual noise, that gave the swampy real-world setting of organisational life its meaning (Langley et al., 2013). From this perspective the parable seemed to capture an ontological and epistemological distinction between the two domains, and exposed a relational tension between the worlds of theory and practice. As eager academics climbed the mountain in order to get a clearer view, the process of climbing higher and higher appeared to drive a wedge between them and the practitioners below. These practitioners were not focused on the valiant efforts taking place on the mountain – they were busy throwing mud at one another in the swamp (Blackwell, 2008), engaging in the daily grind and mini dramas of organisational life (Langley, 2019) and desperately seeking someway of making sense of their setting (Weick, 2005). Ultimately, either side became so absorbed in their respective activities that they lost interest in one another.

This way of thinking had a considerable impact on how I viewed my role as an executive educator. There seemed to be a need to take the knowledge from the classroom and *rekindle* it in a way that was fitting for its new context in the workplace. This was adopting a mediating role as an educator, actively bridging knowledge between two contexts (Dobson, 2012). Practically, the work of Karen Evans and her colleagues (Allan et al., 2015; Evans et al., 2009a, 2010a, 2011; Evans & Guile, 2012; Fettes et al., 2020) on recontexualisation brought the changing role of knowledge(s) to life for me and became central to how I approached the process of programme design and delivery. That said, as important as recontextualisation became in my approach, it often felt that I championed this position somewhat surreptitiously. In

particular it competed for attention with the powerful presence that the transfer of training exerted in my field of practice (Hughes et al., 2018). Transfer of training placed significant faith in the predictive power of programme-related variables to deliver straight-line change in the workplace (Evans et al., 2010a). This backdrop represented a constant methodological tension in my practice setting.

1.1.2. Different knowledge(s), realities…and times

The more I worked with recontextualisation the more I felt that there was a missing ingredient in the framework, something to do with the role of time in post-programme recontexualisation processes. In particular I had a hunch that participants often returned to their workplaces after a programme and quickly became drawn into contexts that were saturated with temporality. Furthermore it felt that these saturated settings were not neutral, and that they had an impact in some way on the participants commitment to practise new formal knowledge (Burkeman, 2019). Most of all I suspected that the understanding of time in these practice contexts was more than just the common-sense notion of time as a linear, undifferentiated backdrop (Adam, 2004a) - it was a richer, more multiple and complex phenomenon (West-Pavlov, 2012). Time in these settings included what seemed to be 'non-linear' features like interruptions (Wajcman & Rose, 2011), aspects of flow (Crawford, 2016) and pace (Sharma, 2014). As my thoughts developed I needed a way of testing this hunch in some way. Between 2011 and 2017 I undertook a short exercise on the final afternoon of many of the learning programmes I worked on. In total the exercise was run over 45 times, in a variety of settings with different organisations. Employing a simple 'box' method, where participants used the sides of a plain cardboard box to write the immediate thoughts that came into their head, I asked each participant to answer one question. 'What normally gets in the way of practising your change commitments after a programme?' Across all the exercises, time or time-related factors made up over 40% of the factors, the largest single category recorded. This suggested that there might be some basis to my hunch. One of these exercises became the basis for a poster at the 2017 Cambridge EdD Conference (Figure 1-1).
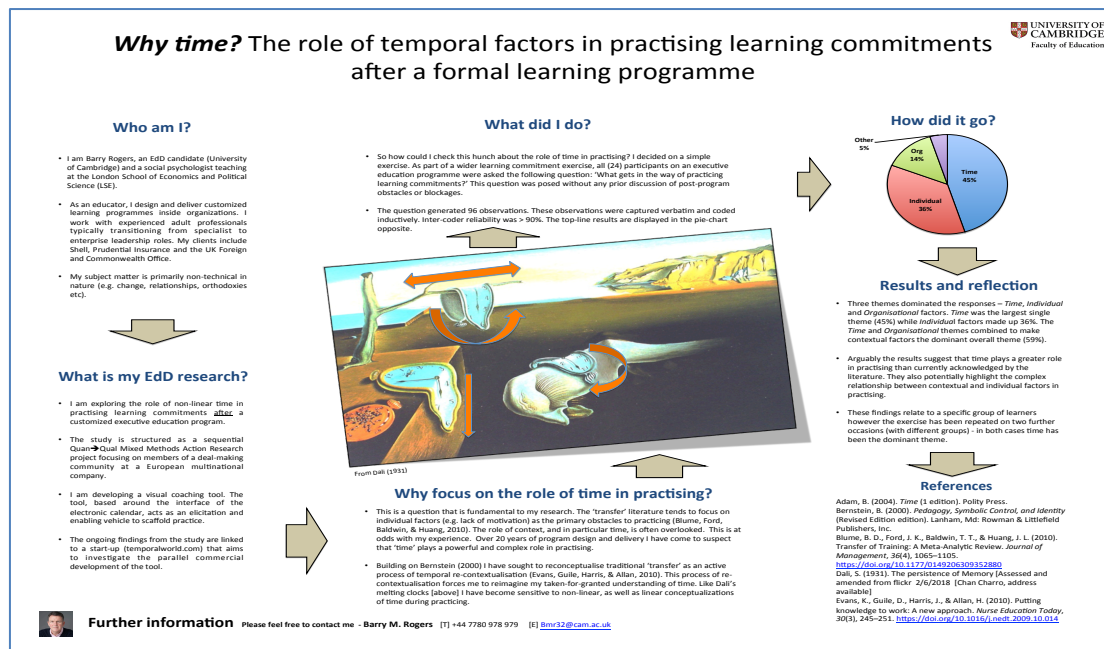
Figure 1-1 'Why Time?' poster presented at EdD Confernece 2017

1.1.3. Combining understanding and use – Pasteur's Quadrant

By 2012 I had decided that I needed to move beyond my hunch and that I required a way of thinking more rigorously about this issue. Furthermore I did not want to generate knowledge and hope that it would trickle down in some way to practitioners, I also wanted to do something practical with that knowledge. The EdD, as a means of bridging rigour and relevance, became the vehicle to address the issue (Burnard et al., 2016; Fulton, 2018; Thomson, 2016). In seeking to hold the lens of rigour and relevance in equal measure, it appeared to me that I required some element of fundamental understanding from my research while also having considerations for use. Building on the work of Donald Stokes, this seemed to locate what I wanted to achieve within the realm of Pasteur's quadrant (Stokes, 1997). The potential study was clearly not in Bohr's quadrant - pursuing pure basic research with the hope that knowledge would indirectly make its way to end-users at some stage in the future. Nor was it in Edison's quadrant of pure applied research, something that lacked a clear and distinctive contribution to knowledge. The enquiry had to be use-

inspired 'basic' research – a contribution that was practical but also answered deeper questions in novel ways. The dual considerations of understanding and use became the key driver for the study.
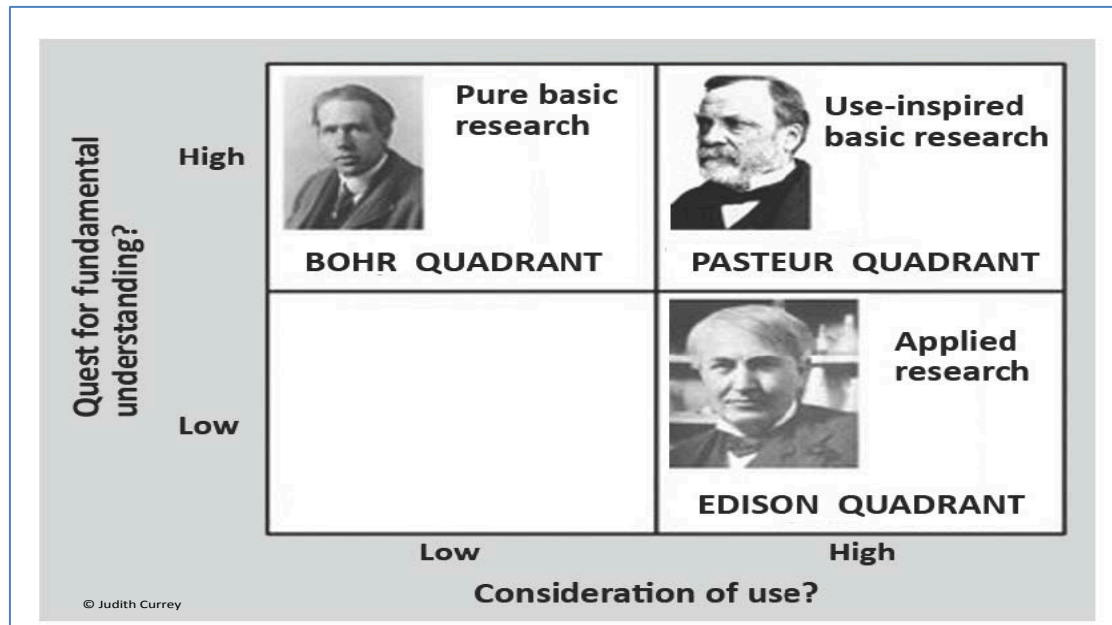
Figure 1-2 Considerations of understanding and use ('Pasteurs Quadrant')

Source: Judith Currey.com

1.2. Section 2: Outline of the study

1.2.1. Overriding research questions

The drivers of understanding and use supported three overriding research questions underpinning this study. Given the nature of these requirements, the questions aimed to answer both 'what' and 'how' questions. They sought to understand the role of time in the wake of a formal learning programme and what type of impact time might have on well-intentioned, post-programme commitments to change in the workplace. The questions also sought to see how knowledge generated by the study could be used to develop a practical artefact that might facilitate the practising of change commitments in the workplace. This artefact eventually took the form of a web-based visualisation tool based around different dimensions of time. Throughout

there was also a desire to explore how knowledge generated from the on-going research might refine the learning programme underpinning the study and also what the wider impact of the study might be.

[1] What is the role of time in practising change commitments (for members of a commercial deal-making community) after an executive education programme?

[2] How can members of this community, and other interested parties, help in the development of a post formal-learning intervention (a temporal visualization tool) to facilitate the practising of change commitments?

[3] What is the impact, if any, of this tool? What are the wider implications of the research from a programme design perspective also in terms of my personal development?

1.2.2. Outline of the study

This study employed a contextual approach to addressing the three research questions outlined in the paragraph above (McLaren & Durepos, 2019). Broadly it adopted a social psychological stance, informed by a sociological tradition, as a contextual lens of enquiry (Farr, 1996). This stance had implications for the two themes underpinning the research questions – the practising of change commitments in the post programme setting and the development of a working tool to support that practising. It elevated the role of process (Langley et al., 2013; Langley & Tsoukas, 2016) and temporality (Adam, 2004b; Langley, 2019; West-Pavlov, 2012) in seeking to understand and use the knowledge generated from investigating these themes. This fostered a belief that these phenomena did not drop in a magical moment, fully formed from the sky but unfolded and evolved both over and in time (Reay, Zilber, et al., 2019). Crucial to this stance and belief was keeping the individual as the focus of analysis (Hager, 2011). This individual was framed throughout the study as an embodied, interacting actor situated within an unfolding temporal context (Mead,

1972, 2002a) and sensitive to wider relational processes (Langenberg & Wesseling, 2016; Morley & Hosking, 2003). Guided by a combination, and sometimes a tension, between interpretivist and constructionist perspectives (Holton, 2005) the concept of plurality wove a thread throughout the study - many of the phenomena encountered were seen in multiple as opposed to singular forms (Tsirogianni & Gaskell, 2011).

The site of the research was a European trans-national corporation called Forum (anonymised). The learning programme (*Impact*) underpinning the research involved an established community of knowledge workers responsible for executing commercial deals at the company (Jemielniak, 2012). Although the *Impact* programme was highly regarded, and had many of the ingredients of an 'ideal type' (Swedberg, 2017), there were question marks in my mind over the effectiveness of putting acquired knowledge to work in the post-programme context. This belief was not initially shared by Forum management and the issue of a common problem definition involved a process of mutual coalescing over the course of the study. The key stakeholders of the research setting are described in detail in Chapter two.

Throughout the study, making sense of the post-programme context was constrained by the dominant frame of understanding within my field of practice - the transfer of training (Baldwin et al., 2017; Blume et al., 2010, 2019). This frame cast a long and powerful shadow over many aspects of the study (Hughes et al., 2018) and the logic for replacing Transfer as a frame became a central plank in moving the study forward. The development of this logic is explored in Chapter three. The limitations of Transfer lead the study down a non-dualistic, re-contextualisation route (Allan et al., 2015; Evans & Guile, 2012; Guile, 2018) extended to incorporate dimensions of linear and non-linear time (Adam, 1998, 2004a). In line with the unfolding nature of process and temporality, various strands and literatures shaped thinking and use on an on-going basis throughout this study. These different strands were introduced and explored as they became relevant.

The research design was constructed as a process study (Langley et al., 2013) with an action orientation (McNiff, 2013; Stern, 2014). The dual requirements of

understanding and use drove the logic of data representation, capture and analysis through a range of temporal phases (Reay, Zafar, et al., 2019; Reay, Zilber, et al., 2019) with Process Tracing as the core analytical approach (Beach, 2017; Collier, 2011; Ricks & Liu, 2018). The considerations of understanding and use meant that analysis took place at different moments over the course of the study (e.g. 'In flight' and 'after the event' (Langley & Tsoukas, 2016)) and plotting the development of both became a central theme of analysis. This process did not happen in a vacuum however - it involved multiple relational stakeholders inside and outside Forum that made up the 'story behind the story' of the study (Donnelly et al., 2013). This informed a backstage element to the research design that became a crucial platform for on-going sense making and reflection (Punch, 1986) and contributed to the conceptualisation of quality underpinning the research (Degama et al., 2019).

The development and use of a visualization tool was the central feature of the study (R. E. Meyer et al., 2013). In its final form this was an interactive, web-based tool built around five temporal dimensions that aimed to paint a picture of a timescape (Adam, 2008) in the post-programme context. The story of tool development involved assumptions tested, plans changed, lessons learned and an eventual artefact that took shape through an on-going process of iteration over 5 years. The story of this process, as well as the tool's use and evaluation, make up the backbone of the study and shifted the focus between considerations of use and understanding as the study progressed. Ultimately the lessons associated with this shift in emphasis challenged some of the key assumptions and headline results from the study.

1.2.3. Structure and format of the study

The study is broken down into three separate papers comprising of eight chapters in total. While the papers are presented separately the chapters unfold cumulatively (numbered 1-8) to facilitate navigation by the reader. Each of the three papers is preceded by a short outline aimed at locating the paper within the overall account.

This first paper ('Background to understanding and use') contains 5 chapters. The paper aims to provide the context to the study as well as an opportunity to explore how the conceptual, methodological and theoretical approaches of the study came about. The second paper ('Development of the tool') explores the evolution of the visual tool over a period between 2013 and 2018 (Chapter 6), and how the process of data representation, capture and analysis supported this development. In parallel with this it charts the growing understanding of the role of time in the development of the tool, and more generally in the temporal understanding of the post-programme context. The third paper ('Interaction of understanding and use') evaluates the use of the tool after a specific *Impact* programme in 2018. This evaluation phase became known at Forum as the Post-Programme Process (PPP) and provided an opportunity to inductively explore four temporal themes that emerged over the course of the evaluation (Chapter 7). The final chapter (Chapter 8) considers the impact of the study as well as its key limitations. It also integrates the findings from the three Papers into a discussion of the development of understanding and use over the course of the study.

The process of data representation is central to the evolution of the visual tool in Paper II. While the development of the tool occurred in parallel with data gathering and analysis, operationally it was often a distinct process with different theoretical, practical and relational considerations. This gave representation a 'first among equals' status alongside data capture and analysis. It also meant that the on-going process of data capture and analysis was integrated into Paper II to reflect the supporting nature of both to the process of representation. More broadly the nature of the visual medium provided challenges for a standard written format. This informed two decisions surrounding the layout of the study. The first was to present the visual evolution of different types of representation between 2013- 2018 as a core feature of the second paper. The aim is to give the reader an appreciation of how the visual thought process evolved, and was grounded, from the earliest images to the final working tool. Ultimately however there are limits to the capabilities of static text when it comes to visual description. Accompanying the visuals therefore is a short YouTube video illustrating a simulated working example of the tool from the final

evaluation phase. This aims to supplement the written text in Papers II and III by giving the reader an experiential sense of the tool's temporal dimensions.

As the core account unfolds the study attempts to capture the backstage stories of the research process. In practice this means that situations and circumstances relevant to the core account are given a degree of prominence in the text. Capturing my voice, and the voices of others invariably highlights the use of the personal pronoun (Thomson, 2016). I seek to balance this usage in ways that respect academic convention but also avoid neutering my presence, or that of others, in the unfolding account (Cunliffe & Alcadipani, 2016; Pagan, 2019). Specifically I employ indented text boxes as a means of highlighting these instances (Coghlan & Brannick, 2014). The boxes represent opportunities for description, reflection and reflexivity and appear throughout the 8 chapters. The boxes are indented in order to separate the distinct nature of the content from the main body of the text. Data for the boxes was grounded in note-taking, a key feature of the study.

Adopting a Process methodology highlighted a number of challenges when it came to the presentation of the study. Ultimately it seemed most appropriate to present findings and analysis as an unfolding temporal account. This coincided with a central feature of the study - the *development* of understanding and use over time. To capture the flow of understanding, most chapters in the study include a discussion section in order to place the process of on-going sense-making and understanding within the context of the unfolding temporal account. The aim of on-going discussion is to delineate the level of understanding and use at particular points in time. The hope was to display what exactly was known about the process, when it was known and how it ultimately contributed to understanding in the moment and after-the-fact. Despite the challenges of this approach, presenting the alternative, a fully-baked a-temporal account, felt like a methodological betrayal to the nature of the study.

Supporting documentation is provided by way of appendices at the end of each Paper. The appendices also have a process character in attempting to show the nature of the supporting documents at specific points in time. To achieve this, the documents are

usually presented verbatim, as they appeared at that time. In many cases a short 'bubble' note is provided in order to give context or highlight a specific feature relating to that phase. More broadly, references to Forum employees and activities were severely limited by the negotiated Research Agreement (See Paper II, Period 3) underpinning the study - this means that there is a need for redaction throughout many of the supporting documents, including interview transcripts.   It is important to note that formal data capture for the study was completed in January 2018, before the advent of COVID19. The impact of the subsequent lockdown on working practices and activities has a bearing on many of the original findings and observations. Where relevant I have sought to highlight the implications of the pandemic for the nature of the original findings.

Finally a variety of terms are employed in specific ways over the course of the study. 'Programme' refers to the formal customised learning programme (*Impact*) underpinning this research. 'Formal programme learning' refers to the nature of knowledge generated in these types of settings and the 'post-programme context' refers to the day-to-day workplace that programme participants return to after a formal learning programme such as *Impact* (e.g. their day-to-day practice setting). In talking about research subjects, a distinction is drawn between 'participants' and 'respondents'. Participants refer to individuals while they are engaged on the formal programme (*Impact*), while respondents represent those participants who subsequently took part in the study. The 'transfer of training' as a field of research is referred to as 'Transfer' (capital T). References to the term 'workplace learning' is used generically to describe alternative approaches to learning in the workplace and is not used to imply a particular strand of thinking within the field.

The aim of the upcoming chapter is to provide the reader with a detailed granular account of the various constituents in the research setting as well as the nature *Impact* programme and how it set the scene for the problem underpinning this study. Formal learning programmes vary hugely in practice (Aggarwal & Zhan, 2018; McCarthy et al., 2016) - they cannot be compared with one another without a detailed

understanding of their background and logic. That background is the subject of Chapter Two.

2. Setting the scene

This chapter sets the scene for the study. It looks in particular at the company, the programme, its participants and the wider stakeholders behind the research. In doing so it explores the challenges facing the company in the design of the programme and how these challenges contributed to a complex change profile for programme participants. The programme is described in detail – this includes the logic behind its design and delivery and its evaluation and results. This backdrop is then discussed in the second section. First, I consider the implications of the conceptualisation of programme 'success' for the problem underpinning this study, and how a coalescing around problem definition occurred over the course of the study. Second, I link the challenges surrounding problem definition to wider issues over the conceptualisation of programme learning at the company and the consequences this had for the understanding of the post-programme context.

2.1. Section 1: The research and practice context

2.1.1. The company: Forum

The site for this research is a European trans-national corporation. Forum (as it is called in the study) is a household name established over 100 years ago. It operates in 70 countries worldwide employing close to 90,000 people.

For most of its existence, Forum has been a market leader in its field. This position of dominance has been achieved primarily due to its technical capability, market knowledge and global network of businesses. In recent years however Forum has experienced significant changes in its commercial and competitive environment. Volatility in commodity prices has impacted its profitability while shifts in digital technologies have disrupted its basic business model. Simultaneously, wider cultural changes have threatened the company's societal licence to operate in many of its

traditional markets. These factors have made it increasingly difficult for Forum to execute the type of commercial deals it needs to operate successfully as a company.

In 2007, senior management at Forum recognised that the changes facing the company had implications for its long-term survival. To address this they set up an internal, business-led *Academy* to explore how the company could equip its front line professionals to operate successfully in this changing context. The *Academy* initially set out four parameters to underpin its approach to formal learning. First, *critique* - the need to challenge deep, taken-for-granted assumptions surrounding the relationship between Forum and its external stakeholders. Second, *value* - the need to understand 'what really mattered' to Forum's expanding, increasingly diverse stakeholder base. Third, *transformation* - a belief that change would challenge established ways of thinking at Forum and that this would have significant implications for how Forums employees operated on a daily basis. Finally, *doing* – the need to ensure that changes in thinking at Forum were linked to application and activity in the workplace. In 2008 the Academy set out plans for a learning programme (*Impact*) that could spearhead this process of change within the company's deal-making community. *Impact* became the learning programme underpinning this research.

2.1.2. The programme: *Impact*

Impact is a four-day, face-to-face change programme for professional dealmakers. The programme has a strong experiential character and places a premium on contextualisation and relevance. *Impact* combines pre-programme, face-to-face and post-programme activities - its face-to face component is based around two, day- long customised simulations. The programme has two overriding 'content' themes: challenging assumptions ('orthodoxies') and appreciating perspectives of value. These dual themes provide the backbone of the programme from start to finish.

The structure of the programme has evolved significantly since inception. Between 2007 and 2010 it operated as two, 3.5-day face-to-face modules with a six-week break between each leg. This approach proved costly (e.g. travel) and disruptive to participants, a feature reflected in declining participation in the second leg. In 2010 the Programme integrated its core components into one, 5-day face-to-face module. This was slimmed down to the current 4-day structure in 2015.

The *Impact* programme has a strong 'open-skill' orientation (Blume et al., 2010). This gives participants the flexibility to choose what specific aspect of change they focus on over the course of the experience. The logic for this lies in the nature of Forum's structure. The broad diversity of businesses at Forum can lead to very different individual requirements from participants, while the overall challenges facing these businesses can be similar. As a consequence, participants are encouraged to develop their specific needs within the broad conceptual parameters of the programme (e.g., what is most relevant to an individual participant within the context of challenging orthodoxies/assumptions etc).

From the start Forum management required *Impact* to be grounded both from a practical and theoretical perspective. Underpinning this guidance was a belief that mature professional adults learn in diverse ways (Merriam et al., 2006) and that this diversity is best captured through creating relevance, connection and contextualisation. In the spirit of pragmatism *Impact* has sought to employ a coherent mix of approaches that are fit for purpose in putting knowledge to work in its businesses. Since 2008 an informal 'pedagogy' has developed that encompasses a way of thinking and talking about Impact's design and delivery.

The *Impact* pedagogy incorporates aspects of 'Transfer' (Baldwin et al., 2017) as well as recontextualisation (Evans et al., 2010b) approaches to learning and I will explore these in greater detail in the next two chapters. However, it is worth noting that they represent very different approaches to workplace learning and activity. The tension between these approaches represents a wider tension at Forum (and many

organisations) relating to how programme learning is framed, something I address further below. It is also worth noting that my methodological perspective, as principal programme designer, has informed many aspects of *Impact's* pedagogy. Again, while this represents a potential area of tension the pragmatic mix of learning approaches is ultimately tested by the 'success' of the programme.

The defining features of *Impact's* pedagogy are built around six core beliefs. First that any change in behaviour is ultimately a function of both the person and their context (Lewin, 2007). Second, that the nature of the changes facing the typical *Impact* participant are not easy – they often have transformative, identity implications (Mezirow, 2009). Third, that transformative change often involves a range of conflicts and contradictions for participants (Engestrom, 2010). Fourth, that these conflicts can also force participants to challenge deep, taken-for-granted assumptions ('orthodoxies') at a personal and professional level. Fifth, that both learning and activity are not solely an individual act – they require wider social support and scaffolding (Daniels et al., 2007). Finally, that knowledge needs to change in some way as it moves from the classroom to the workplace (Astley & Zammuto, 1992).

Appendix **A** contains a detailed day-by-day description of the *Impact* programme as well as an overview of the pre and post-programme activities. Each of the six pedagogic beliefs highlighted above are also mapped onto respective programme practices in the description. This description has been placed in the appendix to facilitate a more detailed understanding of the programme and to maintain the flow of this chapter. The description is included in the word count of the submission.

2.1.3. The participants

The respondents for the study had all previously participated on the *Impact* programme. These participants are experienced, commercial dealmakers - the employees who organise, structure and negotiate the large-scale transactions that shape the direction and future of Forum. The typical participant profile is mid-career

(40+ in age), male (60%), with a strong technical background (e.g. engineering) and a high level of academic achievement (many with PhDs). Potential participants are drawn from across Forum's businesses and are required to have a minimum of 10+ years deal-making experience prior to participation on the programme. Programme registration is by nomination with participants accepted after a rigorous selection process involving their business and leadership within Forum. More generally, *Impact* participants would typically be described as knowledge workers (Jemielniak, 2012) – those that work primarily with intangibles where knowledge is both the input to, as well as the output of, what is produced (Newell et al., 2002). At Forum the nature of business knowledge tends to be technical, highly specific and strongly quantitative.

Two aspects of the typical participant profile can make the nature of change challenging for participants on *Impact*. First, the majority of participants are facing career transitions into leadership roles that often involve significant, threshold changes in their work and life (Donovan, 2017; Vidal et al., 2015). Second, the nature of these changes at a complex multinational organisation like Forum are often not clear-cut. It is worth exploring these factors in a bit more detail as it has relevance for the nature of the changes participants tend to grapple with in the post programme context.

The transition to a leadership position is often tied to a 'mid-career' change profile (Sullivan & Al Ariss, 2019). Mid-career is defined as a period of intra career role adjustment (Grady & McCarthy, 2008). It is usually a period when the individual faces some form of decision concerning the direction and shape of their future career (Blass et al., 2008). At Forum many *Impact* participants will have started in specialist technical roles where they are judged on their individual performance and output. At this stage they are often highly task-focused and work under close direction and supervision (Bass, 1990). Transitioning into a leadership position usually requires a qualitative shift in mind-set, behaviours and focus (Lord & Hall, 2005). This shift often brings greater people responsibilities, the need to oversee and supervise the work of others and a change in the nature of decision-making. At Forum it also tends to require greater relational focus in how a participant operates in their day-to-day role

(Goldsmith, 2008). This can make mid-career change extremely challenging (Plimmer & Schmidt, 2007). The meanings an individual holds about who they are and what they do can change substantially (Ibarra, 2004, 2015), challenging how an individual sees themselves and how others see them (McMahon & Watson, 2013). This in turn can have significant implications for their personal and social identity (Grint, 2005). Often these identity aspects are associated with broader questions surrounding personal values (Schein & Maanen, 2013), life stage (Sheehy, 1997) or work-life balance (Grady & McCarthy, 2008).

A mid-career shift is often presented as a clear-cut, vertical move (Kotter, 1990). In reality however, contemporary organisations like Forum are too complex for any one individual to oversee (Pearce & Conger, 2003). Leadership is therefore better understood as distributed and existing at many levels and under many guises throughout the organisation (K. James, 2018). Here leadership is not some 'heroic' individualistic concept (Paul et al., 2002) with clear-cut behavioural prescriptions and well-defined labels (Hollenbeck et al., 2006). Distributed leadership is more often relational (Uhl-Bien, 2006), contextual (Osborn et al., 2002) and heavily reliant on stakeholder management (Carroll et al., 2008). It also tends to highlight a distinction between what is known as 'domestic' and 'global' leaders (Caligiuri & Tarique, 2012; Mendenhall et al., 2012). Domestic leaders fall within the traditional definition of a hierarchical leadership transition (e.g. the executive moving to another more senior level on the linear career ladder). 'Global' leaders tend to take a different route. They most often transition to new roles that are lateral and non-linear in nature e.g. running a different business in a foreign country as a 'stretch' assignment within the same business (Whitepaper & Macaux, 2010). Both routes may require a qualitative shift from the individual in terms of what they do and how they see themselves but in many cases the Global leader role may not be presented as a traditional 'formal' transition. This can make the nature of change in the post-programme setting more challenging as much of the symbolism surrounding change (e.g. labels, rituals and artefacts) is missing (Smith & Stewart, 2011). This is the case for many *Impact* participants.

2.1.4. The wider stakeholders

Impact participants were not the only stakeholders involved in the research process at Forum (Crane & Ruebottom, 2011). A broad range of parties formed a complex, relational web around the on-going design and delivery of the *Impact* programme and hence also had an interest in this research. These included Human Resources, Learning & Development, teaching faculty, line managers and sponsors (Guerci & Vinante, 2011; Janmaat et al., 2016). The differing perspectives of these diverse stakeholders meant that activities related to programme learning could never be fully divorced from the question of underlying interests (Alvesson, 2011). Two of the most important stakeholders at Forum held key gatekeeper and sponsorship roles in relation to this study (Breese et al., 2020). These are referred to as the 'Senior Sponsor' and 'Junior Sponsor' and they appear frequently over the course of the study. Day-to-day, these were the people that I dealt and operated with at Forum meaning that both were key actors in the foreground and background of this research. They were also part of a wider web of stakeholders relevant to this research.

A basic stakeholder map for this research can be divided into three clusters - the Academic, Forum and Family clusters. The Academic cluster ['A1'] is informed primarily by my role as an EdD candidate at the Faculty of Education, University of Cambridge. In this role I have a set of relationships that have been central to the study (e.g. my supervisor, programme manager, colleagues etc) but also those that have played more ad-hoc roles (e.g. ex-Head of Department). This cluster also contains broader Cambridge contacts ['A2'], other universities where colleagues have connected with the research and my own Department at the LSE ['A3']. The 'Forum' cluster ['B'] includes the programme participants (e.g. the respondents), the Forum sponsors (Senior and Junior Sponsor) and a variety of interested parties e.g. HR and contracts. The family cluster ['C'] includes my role as partner, father, son, relation and friend to direct and extended family. A simplified stakeholder map for the study is presented in Figure 2-1 below.
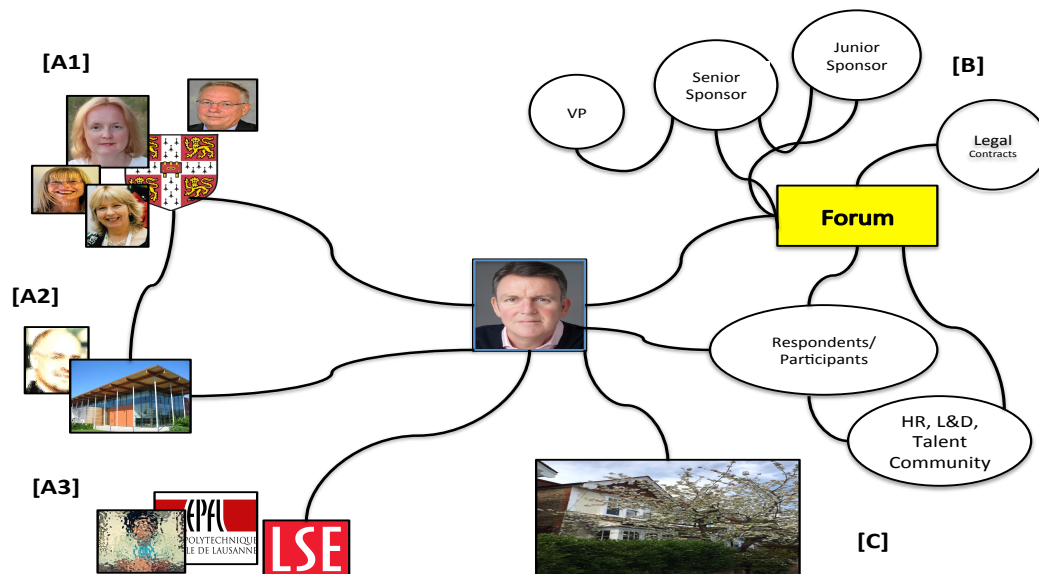
Figure 2-1 Simplified study stakeholder map

2.1.5. The faculty - my role

As evident from Figure 2-1, I was a key stakeholder in this research. I have been the lead teaching faculty for the *Impact* programme since 2008. In this role I am the principal programme designer; I teach individual content segments and am responsible for the overall programme narrative and structure. Given the longevity of the programme I am one of the few remaining people, either internal or external to Forum associated with *Impact* since inception.

When first considering the design of the *Impact* programme my career profile was appealing to Forum. My early career experience had been in front-line financial services. I changed direction in 1997 and have subsequently taught as a social psychologist at the London School of Economics - my speciality field of interest concerns bridging the relationship between theory and practice in organisational life. In 2002 I became a partner at a leading provider of customised executive education.

In this role I designed and delivered customised executive education experiences globally for a range of organisations. The mix of my career experiences was a factor in my subsequent role on *Impact*. The quantitative and technical skills from my role in financial services alongside the qualitative and relational aspects of social psychology were seen as a relatively rare combination in an educator and something that potentially enhanced my credibility in front of *Impact's* participants.

How do I position myself as an educator? In general I tend to straddle the differing ontological settings of theory and practice (Tushman & O'Reilly III, 2007). I see this as a 'third road' (Fukami, 2007) to Schön's mountain-top, a mediating position that often involves translating knowledge to make it fit-for-purpose in different contexts (Dobson, 2012). In this role I employ strategies and processes of re-contextualisation (Evans & Guile, 2012) to act as a sense-giver in different settings (Sutcliffe & Wintermute, 2016). This has been called a 'pracademic' (Posner, 2009). Over the years I have found that this is not an easy role to inhabit (Carton & Ungureanu, 2018). As neither a pure academic or a full-time practitioner it does not have a clear-cut identity (Vroom, 2007) and can often be portrayed as sapping the purity of understanding associated with either side of the underlying duality e.g. the translator as a 'traitor' (Shearn, 2016).

2.1.6. Change commitments – a link to the post-programme context

When setting the objectives for the *Impact* programme, Forum management were eager to stress the need for classroom learning to translate into action and activity in the workplace. This desire was reflected in decisions concerning the structure, design and delivery of *Impact*. Ultimately however, whether something changes in the post-programme context relies heavily on the individual programme participant and the nature of the change commitment they decide to pursue. Before proceeding it is worth spending a few moments to understand in more detail the nature of these commitments.

A key link between *Impact* and its post-programme context comes in the form of a change commitment. A commitment is defined as 'a promise or firm decision to do something' (Cambridge English Dictionary Online, 2019). Similar to other programmes a participant makes a change commitment on the final afternoon of *Impact* – a statement of their intent do something different when they return to the workplace (Goldstein & Ford, 2001). This statement is usually linked to a prior area of development (Quiñones, 1995) and elaborated within an action plan (Kirkpatrick, 2019). This plan is often structured on a S.M.A.R.T. basis – Specific, Measurable, Achievable, Relevant and Time-bound (Phillips, 2012).

There are issues with the quality of change commitments at Forum. Echoing a challenge in many formal settings (Blume et al., 2010), the documenting of commitments is often tied up with the final sessions on the programme (Biech, 2016). In one sense this is the most logical time for this activity to take place. If *Impact* has been 'successful', it should be clear to the participant at this point what they have learnt and what they now want to apply at work. These moments however can also be highly charged. The participant may feel a 'warm glow' of achievement after a challenging time on the programme. They may also begin to 'check-out', display aspects of physical and mental fatigue and shift their thoughts to what is happening next in their lives (Hutchins & Burke, 2006). Alternatively if the programme has not been 'successful,' they may want to get away from the setting as quick as possible. These last minute considerations can often undermine the quality of commitments.

Ultimately a change commitment is worth little if it is not practised in a deliberate fashion back in the workplace (Ericsson et al., 1993). Practising is defined as the ability to 'perform (an activity) or exercise (a skill) repeatedly or regularly in order to improve or maintain one's proficiency (*Lexico*, 2019). The role of practising in building capability has a long and contested past. The debate between innate qualities (Galton, 1869) and trained ability (Thorndike, 1912; J. B. Watson, 1930) is long-standing and well rehearsed. More recently a body of literature has championed the need for deliberate practice in order to achieve expertise across a range of domains (Ericsson & Pool, 2016). This suggests that accumulated levels of practice over time

accounts for individual differences in performance and expertise (Macnamara et al., 2016). Many of the headline claims associated with this literature have fuelled popular beliefs about the power of sustained practising (Dubner & Levitt, 2010; Gladwell, 2009; Syed, 2011). One high-profile claim is the '10,000-hour rule', a belief that it takes 10,000 hours of practice to become an expert in any particular field (Ericsson et al., 1993). Sustained and deliberate practising of change commitments provides a challenge for *Impact* and indeed any formal programme. There is a lack of understanding about what actually happens to change commitments when participants return to the workplace. In order to address this, Forum encourages support from managers and also offers one-to-one external coaching to participants. This support, though well-intentioned, is not unproblematic. I will return to this point below.

2.1.7. *Impact* evaluation

Impact is currently ranked number one across the portfolio of learning programmes at the Forum's Academy and is one of the highest rated learning programmes at the company. On the final afternoon of *Impact,* each participant undertakes a lengthy evaluation of the programme, involving quantitative and qualitative scoring. Ratings are determined on a five-point scale with the two key ratings (for Forum) being overall programme satisfaction and individual commitment to apply a change commitment. Over the course of this study the average learner satisfaction scores were 4.7/5 (5 = Highly Satisfied), with the average commitment score also 4.7/5 (5 = Highly Committed). Programme scores were reinforced by qualitative learner feedback that regularly described the programme as the best learning experience at Forum. Finally the programme is routinely oversubscribed with, on average, a one-year waiting list. Since 2008 over 1,200 dealmakers have graduated from the programme making it one of the most long-standing programmes at Forum.

2.2. Section 2: What was the problem?

2.2.1. Different perspectives in problem definition

Setting the scene for this research leads to an immediate question – what was the problem that this study was looking to address? In one sense, for *Forum*, there *was* no problem. The programme was popular, successful and had developed a positive reputation. At the same time its design and delivery had been informed by diverse theoretical perspectives that focused specifically on the need for contextualisation, relevance and activity in the workplace. In line with the Academy's desire for 'doing' this should have enabled the practising and application of change commitments after the programme. Against this however I had developed a strong hunch that the intention to practise change commitments was severely challenged when *Impact* participants returned to the workplace. Whatever my individual thoughts, it would be unrealistic to suggest however that this hunch was jointly shared between myself and Forum, especially in the early days of the research. Ultimately, a process of mutual problem recognition unfolded over the course of the study. The coalescing around a 'problem' can be broken down into two periods.

In the early years (2012 – 2016), Forum stakeholders were not overly engaged in the study. In reality there was no incentive, nor interest, for them to question the categorization of programme 'success'. Following a cost review in 2016 however, there was increased attention on the post-programme context, and in particular the existing forms of post-programme support. While manager follow-up after *Impact* had always been mandatory, there was consistently low take-up on voluntary coaching opportunities offered to participants. Forum was eager to understand why this supposedly valued and costly 'resource' was not happening?

2017 was a turning point in terms of linking the study to wider organizational objectives. A downturn in financial performance led Forum to challenge their assumptions about the 'success' of the programme. In doing so they also recognised that they had very little evidence, beyond anecdotal, about the impact of the programme. This shift in company strategy provided further alignment around the

study's central problem and purpose. In particular it enabled the Forum sponsors to signal to their stakeholders that, by undertaking the study, the company was extending measurement criteria and proactively seeking to advance novel means of post-programme support. Given the wider interests involved in *Impact* this proved to be a non-threatening categorization of the study purpose from an internal perspective.

2.2.2. The *shadow* of Transfer

A significant issue for me over the course of the study has been the ability of Forum stakeholders to 'see' a problem in the post-programme context. What became increasingly clear, as the study progressed, was that this issue of visibility appeared to be related in some way to the lens employed in seeing the role of programme learning at Forum.

There is a strong belief within my field of practice in the power of programme learning to drive post-programme application (Blume et al., 2010; Grossman & Salas, 2011b). This belief tends to support a 'Transfer' mind-set – a belief that knowledge acquired in the classroom transfers in a single movement to the workplace (Evans et al., 2010b). This logic is particularly strong within the Learning and Development (L&D) and 'Talent' communities, many of whom have an instructional design and Human Resource Management background (Association for Talent Development, 2020). Practically speaking, members of these communities *act* as gate-keepers commissioning and overseeing programme learning inside organisations (Hart, 2013; Whelan et al., 2010). This belief in Transfer casts a long shadow within my field of practice and often chimes with a broader worldview inside technical organisations like Forum that places a premium on prediction, measurement and control (Porta, 2008).

This power of Transfer thinking was symbolised by a dinner I attended with the Forum Sponsors and their team in early 2019. At this stage the research had been completed

and the headline results shared. While there was broad support and plaudits for the outcomes of the study, I could tell from the nature of the conversations that the majority of the team still struggled to understand why a specific effort might be needed to support the practising of commitments *after* a programme. As the night progressed the team members continued to return to the same mantra - surely it is the role of a well-designed programme to deliver results. By the end of the evening, I had become convinced that I needed a stronger articulation of the reasons why Transfer as a lens of understanding was incapable of doing justice to the post-programme experience.

2.2.3. The next step

The shadow cast by Transfer appeared to have profound consequences for the conceptualisation, or more to the point, the lack of a conceptualisation of the post-programme context. This in turn had implications for the nature of this study, and direction of its enquiry. Whatever my personal perspective or beliefs I could not dismiss Transfer from the lofty heights of the mountaintop and expect Forum colleagues to agree with me. Many of the beliefs underpinning Transfer were deeply held and embedded within that community - if I was to create a credible methodology for the study I needed to first build a grounded case as to why Transfer was unhelpful in seeing issues in the post-programme context. This is the subject of the next chapter.

3. The shadow of Transfer

At the end of Chapter Two I highlighted the extent to which Transfer, as a way of thinking and talking about formal programme learning, has come to dominate my field of practice. This had significant implications for this study as it appeared to render the post-programme context invisible to many that operated in my field of practice. If I was to fulfil the dual requirements of understanding and use I needed to establish a credible conceptual and methodological base from which to make the post-programme context visible.

This chapter explores the grounding to the (long) shadow of Transfer. In doing so it locates this exploration within the recent *crisis* in Transfer and the broader problems that this moment has exposed (Baldwin et al., 2017; Ford et al., 2018). This leads to a claim that Transfer is methodologically incapable of painting a picture of the practice setting, creating a need to find other ways of doing justice to the issues associated with that context.

The chapter is organised into three sections. Section one critically explores the problems with a Transfer lens and seeks to highlight the conceptual, ontological and epistemological issues that limit understanding of the post-programme context. Informed by a different set of literatures, Section Two attempts to paint a picture of this context highlighting the defining role of temporality and knowledge(s). Section three briefly considers the implications of the issues with Transfer for the research design and the theoretical framework employed by the study.

3.1. Section 1: The 'problems' with the transfer of training

The metaphor of Transfer dominates the literature concerning the application and use of formal programme learning (Hager & Hodkinson, 2009). As a working definition, the transfer of training has two key dimensions (Syrek, Weigelt, Peifer, & Antoni, 2016). Firstly, *generalization* - the extent to which knowledge and skills

acquired in a learning setting are applied in different settings and/or situations. Secondly, *maintenance* – the extent to which changes that result from a learning experience persist over time.

Transfer research focuses on those factors that are believed to influence (and predict) the generalization and maintenance of learning (Vandergoot et al., 2019). These factors fall into three broad categories – trainee characteristics, training design and delivery and work environment (Baldwin & Ford, 1988). Trainee characteristics cover aspects relating to the individual such as personality (Ng & Ahmad, 2018; Roberts et al., 2018; Vignoli & Depolo, 2019), self-efficacy (Chiaburu & Lindsay, 2008; Iqbal & Dastgeer, 2017), mastery orientation (Bell & Kozlowski, 2008; Kozlowski & Bell, 2006) and motivation (Awais Bhatti et al., 2013; Gegenfurtner et al., 2009; Renta-Davids et al., 2014). Training design and delivery shifts the focus to programme-related factors such as learning strategies (Bhatti & Kaur, 2010; Lim, 2000), modelling (Dirani, 2017; Taylor et al., 2005), error management training (Gully et al., 2002; Keith & Frese, 2005, 2008), goal setting (Rahyuda et al., 2014; Shoenfelt, 1996) and retrieval (Pan & Rickard, 2017). Finally, work environment factors focus primarily on the conditions before and after training including the role of supervisors, peer support and organisational climate (Dragoni et al., 2014; Ford et al., 2018; Kraimer et al., 2011; Sitzmann et al., 2008; Smith-Jentsch et al., 2001; Taylor et al., 2005). While the emphasis may differ in these three categories the common thread through each is a belief in the predictive power of the factors to transfer knowledge in a single movement to the workplace (Evans et al., 2010b).

3.1.1. The Transfer problem

As a strand of research, transfer of training has had a long and troubled history. Despite an extensive body of literature, what has become known as the Transfer *problem* is now longstanding and seemingly enduring (Barnett & Ceci, 2002). Over its history the field has been characterized by definitional ambiguity, measurement issues and methodological confusion (Baldwin & Ford, 1988). Inconsistent and

conflicting research findings (Cheng & Hampson, 2008) are highly problematic as they impact the perceived credibility and usefulness of the field (Banks et al., 2016). Almost mantra-like, it has become commonplace for Transfer articles to start with mention of the 'issue' and the consequences of this in theory and practice (Nafukho et al., 2017).

In 1988 Baldwin and Ford undertook what became a landmark review of the burgeoning Transfer literature (Baldwin & Ford, 1988). The seeds of future issues were clearly evident in the review. The authors noted that the majority of studies in the review focused on in-programme factors with little emphasis on post-training or contextual elements. They also highlighted a lack of defined interventions to leverage transfer (e.g. specific measures designed to facilitate or enable transfer either during or after a programme) and made a specific plea to address this shortcoming. While maintaining an overall positive tone they were concerned about growing gaps in the literature, inconsistency in findings and what they saw as significant issues surrounding the measurement and operationalization of transfer as a concept (Baldwin and Ford, 1988, p. 100).

The years following Baldwin and Ford witnessed a sizable growth in Transfer publications (Baldwin et al., 2017). At the same time a growing number of reviews and meta-analytic studies sought to bring some order and coherence to the field (Baldwin et al., 2009; Burke & Hutchins, 2007; Cheng & Hampson, 2008; Cheng & Ho, 2001; Ford & Weissbein, 1997; Hutchins & Burke, 2006). The meta-analysis from Blume et al in 2010 was another defining moment for the field. Twenty years after Baldwin and Ford, the authors were hesitant in their assessment of the field highlighting a range of shortcomings that they believed limited the scope for future progress. Relevant to this study, they noted in particular that time appeared to play a very narrow role in the Transfer literature (Johns, 2006). Illustrating that many predictor relationships were significantly affected by the source and timing of a transfer measurement, they noted that there was little appetite beyond this limited conceptualisation to study the nature or impact of temporality. As a concept, time was relegated to the realm of passive backdrop to the act of transfer.

Disenchantment with Transfer has grown in recent years with the field appearing to reach a stage of saturation and stasis (Baldwin et al., 2017). On the one hand there is a belief that progress has been made on a number of 'consensus' areas such as supervisor/peer support and affordances (Bell et al., 2017; Ford et al., 2018), yet these topics are often over-researched and in little need of further investigation or replication. Most of all, the tone of the Transfer debate appears to have changed. A number of leading academics in the field have called for a thorough overhaul in the *approach* to Transfer (Baldwin et al., 2017). This situation sits alongside the broader 'crisis of relevance' that has beset many aspects and facets of the Academy (Hoffman, 2016), leading to a proposed agenda for change grouped around five broad 'issues'. While the headline intentionality associated with this agenda is positive, each of the issues highlighted would appear to be related to wider methodological concerns that are, I would suggest, deeply problematic for the field. I will explore each of these issues below.

3.1.2. Issue #1: Closer proximity to 'trainees'

There is a general call for more information on the nature of research subjects in Transfer studies (Baldwin et al., 2017). This makes sense at a number of levels. It can be commonplace for studies (from all traditions) to reduce the description of research participants to brief, often formulaic profiles as if the subject had fallen from some 'trainee bin in the sky' (Campbell, 1971). This is problematic. As noted in Chapter Two learning programmes, and their participants, can be hugely diverse. This was clearly the case at Forum where the nature of the organisational context, as well as the changed profile of participants, contributed to a very specific programme structure and approach.

Alongside the call for greater information is a specific request for richer, more relevant descriptions of programme participants. Once again it was clear from the profile of *Impact* participants in Chapter Two that research subjects in these types of

studies often have a lot of flexibility surrounding their commitments. Many are active in constructing their own learning and change processes (Baldwin et al., 2009), something that contributes to very personal and distinct learning trajectories (Poell & Van der Krogt, 2010). While the call for richer descriptions has merit, these descriptions need to be meaningful in capturing the lived, proximate reality of embodied humans as they embark on these career journeys (Weiss & Rupp, 2011). They also need to see beyond the individual 'trainee' to make visible the broad relational web that can have an interest in the formal learning process. As noted in Chapter Two this wider web can form a significant presence in terms of learning outcomes and intentions.

3.1.3. Issue #2: A lack of action orientation

Embedded in the call for change is growing recognition that the findings produced by Transfer are often non-action orientated (Baldwin et al., 2017; Banks et al., 2016). This is a brave, and somewhat worrying admission. For a field dedicated to the use and application of knowledge it is also something of an existential admission. Yet this observation is tied to a paradox surrounding how the usefulness of workplace training/learning is often positioned in real-world settings.

On the one hand there is a strong *general* belief that formal development and training in the workplace is 'good' for organisations, something that has led to substantial investments in the field over recent years (Ho, 2016). This investment is usually buttressed by an additional belief that formal learning contributes to the firm's competitive advantage (Kim & Ployhart, 2013; Sung & Choi, 2014) in, what is often portrayed as, increasingly disruptive competitive settings (Horney & O'Shea, 2015). Alongside this *general* belief however is on-going disquiet among practitioners and academics at the usefulness of, and evidence for, transfer at the *specific* programme level (Beer et al., 2016; Ford et al., 2011; Grossman & Salas, 2011a). This is related to deep-running, practical issues surrounding credible measurement of learning outcomes, something I will address in the next issue.

Good intentions aside there would appear however to be a deeper, methodological angle to the issue of action orientation. Transfer findings tend to fulfil the requirements of publishable scientific enquiry within the field by 'identifying, describing and measuring factors that may influence transfer' (Roe, 2008). In so doing they tend to focus on 'what' as opposed to 'how' questions. While this may help in answering big-picture concerns at a macro level, it constrains the field in addressing the micro practicality of change in everyday contexts (Baldwin et al., 2017). This is the level where research is often most useful to practitioners. In addition, switching the orientation in enquiry from what to how is not unproblematic and comes with significant methodological implications. I will return to this within in the discussion of substance ontology later.

3.1.4. Issue #3: The thorny question of measurement

There is growing recognition that Transfer needs to broaden the criteria employed in understanding how knowledge is *actually* put to work after programmes (Baldwin et al., 2017). This again is positive and would seem to have resonance with the situation at Forum. As we have seen, the need for deeper, more creative forms of measurement became one of the ways Forum stakeholders made sense of their involvement in this study.

Unfortunately the issue of measurement invariably leads back to the challenges inherent in Transfer's methodology (Blume et al., 2010). The link between dependent and independent variables lies at the core of this methodological approach. Understanding this link in an isolated fashion would appear unrealistic, when in practice the highlighted variables are often experienced holistically in combination with multiple other factors by programme participants (Baldwin et al., 2017). In addition, the conception of the participant as *active* in their own learning (Bell et al., 2017; Bell & Kozlowski, 2008) opens up a range of implementation choices when they are back in the workplace (Huang et al., 2017). Much of this complexity would appear

to go missing in the calls for effective measurement of transfer, especially when those measures only replicate traditional approaches (Hughes et al., 2018).

Measurement is not just an issue for research findings. The effectiveness of programme learning is also highly problematic in practice (Murray, 2019). This is linked to the use of the most common form of evaluation model in the field - the Kirkpatrick approach (Kirkpatrick, 2019). The Kirkpatrick model suggests that learning can be evaluated at four levels. Level I captures the affective and attitudinal responses to a programme ('Reactions'). Level II focuses on what has been learned and acquired in terms of knowledge ('Learning'). Level III evaluates the extent to which participants have applied their learning on-the-job ('Behaviour') and Level IV judges the extent to which organisational outcomes have changed as a result of the programme ('Results').

The issue for practitioners most often lies with the level of measurement employed in practice. Consistently, most organisations only measure programmes at Level I and II (Reactions and Learning) and very little at III and IV (Behaviour and Results) (Blanchard et al., 2000; Sitzmann et al., 2008). There is little evidence however for any relationship between programme reactions and learning (Level I and II) and actual results and outcomes after a programme (Saks & Burke-Smalley, 2012). This is a long-running fault line in the logic of formal learning and one that Forum, as we saw in the previous chapter, was not immune to.

3.1.5. Issue #4: Seeking a more holistic approach

The two preceding issues (action orientation and measurement) are related to the wider issue of holism in Transfer e.g. the extent to which specific findings from transfer research can relate to a participant's wider organisational experience. Once again, methodological and conceptual issues appear to come to the fore. While transfer studies might achieve 'scientific' validity as individual, isolated pieces of research, this does not necessarily pass for what is valid in the 'real-world' (Wefald & Downey, 2009). The distinction between the different 'thought worlds' of the

mountaintop and the swamp places a different emphasis on what is considered relevant in either realm (Cascio, 2007). Potentially this has had the effect of divorcing much of what is produced in Transfer findings from the bigger-picture that these findings are trying to portray. Employing Forster's analogy it could be suggested that contributors to the field have become like brick-makers, focusing on the individual bricks of their specific findings while losing sight of the overall wall – the combined experience of the practice setting (Forscher, 1963). I will return to the broader issue surrounding the conceptualisation of practice in Section two of this chapter.

3.1.6. Issue #5: The need for dynamic temporality

Finally there have been calls recently for Transfer research to become more dynamic and temporally orientated (Blume et al., 2019). This is a call that resonates strongly with the core focus of this study. That said the issue of methodology is never far away and, once again, would appear to preclude the incorporation of a richer understanding of time in Transfer analysis. As noted above, Transfer tends to construct questions that focus primarily on the *what* that happens *between* specific variables (Roe, 2008). As a consequence the nature of the methodological construct misses the rich temporal dynamics underlying these specific variables. This, by its nature, would appear to be an incomplete account of temporality. In focusing exclusively on the relationship between variables, Transfer overlooks how real embodied individuals *actually* behave in the workplace, both over and in time (Ployhart et al., 2002). In these contexts time is more than an instrument of measurement or a passive backdrop to activity it is an active, foreground ingredient in the learning and implementation process**.** The notion of time as an active ingredient (especially in the practising of change commitments) became a central theme of this research.

3.1.7. Transfer: issues with a label or a lens?

On the surface Transfer's agenda for change looks promising. Many of the issues raised have headline merit and find their way in some form into aspects of this study. Nevertheless the implications of this moment of crisis are also stark, and somewhat depressing. The field of Transfer has become dominated by single-intervention type studies that have shown limited impact on the actual application and use of formal learning in the workplace (Baldwin et al., 2017; Blume et al., 2010). An overarching belief in the predictive power of programmes has also left the field blind to what happens <u>after</u> programmes. Once again this admission of omission underpins the central thrust of this study. The inability to see the problem does not mean it does not exist.

' We know that much happens to the individual trainee from the time they leave training to the time we measure transfer – however we rarely have investigated what happens during that interval'

Transfer of Training: Known and unknown, p. 5.9 (2017)

While statements like this are welcome they raise wider questions about Transfer's ability to undertake meaningful post-programme research. Progress on the five issues outlined above would appear to be severely constrained by the *lens* that Transfer employs to see the world. Repeatedly in this analysis there has been a need to return to methodological limitations, limitations that are intimately related to the nature of knowledge and the understanding of reality. This prompts an important question - to what extent is Transfer's underlying methodology ill-equipped to paint a meaningful picture of the post-programme landscape? To answer this there is a need to explore the basic foundations of Transfer's approach to practice.

3.1.8. Substance, variance and the *invisible* post-programme context

Mainstream learning theory is largely underpinned by substance metaphysics (Hernes & Maitlis, 2010; Malloch et al., 2010), an understanding of reality that views discrete entities as the fundamental units of existence (Whitehead, 1979). This tends to paint

a picture of stand-alone, concrete forms with a-priori properties (W. James, 2018) that maintain their substance over time (Rescher, 1996). Change in these forms, when it does occur, does not unduly effect the underlying essence (Tsoukas & Chia, 2002) and occurs somewhat independent of context (Thompson, 2011). As such, substance ontology frames individuals as collections of properties (Foroohar, 2019) whose context tends to be reduced to the level of background noise and interference (Burke et al., 2009). Seen in such a way it could be argued that producing the 'transfer ready' individual by training is little different to producing a box or any other object (Weiss & Rupp, 2011).

Closely related to substance ontology is the logic of variance theorizing (Mohr, 1992). This seeks to explain difference in a given variable by changes in another, or other variables (Hernes & Maitlis, 2010) leading to a methodological preference for 'what' over 'how' questions (Ortiz de Guinea & Webster, 2014). Furthermore variance theorizing supports a paradigmatic approach to knowledge (Bruner, 1990, 1991; Polkinghorne, 1988; Tsoukas & Chia, 2002) where knowing is a function of defined, limited relationships. This view has implications for the symbolic connections between individuals, negating the wider *relational* context where knowing is a function of the meanings created by these links.

The implicit linearity of variance theorizing impacts how reality is represented – much of what happens above, below, before or after the binary relationships of variance goes missing. Under these circumstances the real-world richness of everyday practice contexts largely becomes invisible. This is particularly the case in the treatment of time. Time ordering and sequencing among independent variables is deemed to be immaterial to the eventual outcome of analysis (Mohr, 1992). This assumption has far-reaching consequences. In the quest for empirical regularities, variance theorizing tends to abstract temporal flow out of the description of organisational life producing what Langley has called 'timeless propositional statements' (Langley et al., 2013). This severely diminishes the capacity of mainstream accounts to understand practice in any meaningful way, especially, as we will see in the next section, when time is seen as a defining feature of that context.

Transfer studies tend to be dominated by variance theorizing. To illustrate this I carried out a secondary analysis of Blume's (2009) meta-analysis of Transfer. Within the bibliography 89 works were starred as included in the analysis. It was possible to get accurate information on 76 of these by reading the abstract and/or the underlying article. References to 'hypothesis testing', 'dependant/independent variables' and related indicators of methodological focus were used as evidence of a variance approach. Over 95% of studies were categorized as variance in nature, with the majority of these focusing on in-programme activities. In light of the methodological discussion above this composition says something about the capacity of the field to see the world of out a different lens.

Framing the world as inhabited by discrete, stand-alone substances has clear implications for what is believed to happen both during and *after* a formal learning programme. Through a transfer lens the programme is designed to act on the individual to bring about some form of change. Associated with this is a belief that the intentionality of that individual becomes paramount (Gollwitzer, 1999; Sheeran et al., 2005; Wieber et al., 2015). There is little room, nor need, in this account to overly support the autonomous intentional individual after the programme. The knowledge acquired on the programme is *seen* as a 'thing' that can be transferred relatively un-problematically from one setting to another (Amelia et al., 2015). This is portrayed as a single, de-contextualised movement (Evans et al., 2010b), unencumbered by the relationship the individual might have with any other 'substances' around them. This is a dualistic account of practice where the post-programme period largely becomes invisible.

Transfer, despite its well-intentioned calls for reform, would seem philosophically, methodologically and practically incapable of addressing the two key features of this study: the role of time and the visibility of the post-programme context. This prompts a need to look further afield in order to move forward.

3.2. Section 2: An initial picture of the post-programme context

The shadow of Transfer presents a dilemma when trying to understand the nature of the post-programme context. If Transfer renders this context invisible, how do we begin to paint a picture of the 'reality' a participant returns to after a formal programme? Other, non-dualistic literatures are helpful (Hager & Hodkinson, 2009). That said, these literatures are not without their own limitations, something I will address further in the next chapter. For the moment I am interested in painting an initial picture of this context and seeing what the granular details of this landscape might look like. This is easier said than done – the nature of the post-programme context often depends on a multiplicity of factors operating at a variety of levels e.g. individual, organisational, culture, gender etc (McLaren & Durepos, 2019). As discussed in Chapter Two however, the participants from Forum represent a distinct type of worker e.g. knowledge workers (Jemielniak, 2012; Ojala & Pyöriä, 2018). As with any form of work, a typical knowledge worker does not exist in a vacuum. They tend to operate day-to-day in a particular *type* of context, aspects of which are detailed in the literatures related to organisation and management studies.

3.2.1. The 'world' of the knowledge worker

The life of the knowledge worker is often based around an office, a space constructed to promote varying degrees of collaboration, creativity and performance (Myerson & Ross, 2002). With information sharing at the core of what a knowledge worker does, they tend to operate in a world defined by interactions and meetings (Scott et al., 2012). These interactions are varied and diverse - they can be formal, scheduled and purposeful (Massimilian, 2016), or informal, unscheduled and spontaneous (Council, 2012). They take place face-to-face, in one-to-one or group settings (Zahn, 1991) or increasingly, on-line (Wajcman, 2018b). These meetings are often managed through online scheduling tools and calendars that give a sense of order and transparency to the life of the worker (Bernstein, 2014).

Most knowledge workers tend to be mobile in their activities and frequently operate outside the office environment (Ojala & Pyöriä, 2018). Here they encounter colleagues, clients and competitors in different sites and locations (Voorhees et al., 2017) and frequently engage in work-related activities outside the direct remit of their day-to-day business function e.g. conferences, client work-shops or training programmes (Choi et al., 2018; Insead, 2019; Knight, 2015). Wherever their physical location, inside or outside the office, they have the ability to stay connected through a multiplicity of communications applications and tools: by phone, e-mail or wireless hand-held devices (Stieglitz et al., 2015). All the while these workers operate within a wider commercial and competitive setting. This setting is increasingly characterized by elements of risk, uncertainty and change (Beck, 2000a). It is often portrayed as a *VUCA* world – a landscape deemed to be volatile, uncertain, complex and ambiguous (Elkington et al., 2017; May & May, 2014).

The two preceding paragraphs were written in 2019 before the global lockdown associated with COVID-19. It is interesting to reflect how the pandemic might impact this picture of the knowledge worker. Dealing in intangibles, it is likely that many knowledge workers were able to fulfil the requirements of moving their work activities to a home environment (Lufkin, 2020). A recent report from the US National Bureau of Economic Research gave the first sense of the implications of this shift (Green, 2020). The study surveyed 3.1 million workers in 21,000 companies across North America, Europe and the Middle East. While time spent in meetings during the Pandemic had gone down, the number of meetings, as well as those attending these meetings, had gone up. Alongside this, an increase in online activity would appear to have increased the duration of the working day by 49 minutes continuing to blur the distinction between private and professional life. The potential conflicts implied in this blurring (e.g. care responsibilities) have meant that 14% of women (11% of men) have considered leaving their current roles (Williams, 2020). This would seem to suggest that being outside the physical office environment has done little to blunt many of the emerging features of working lives (e.g. meetings, e-mails).

Taking Care of Business
Employees across the globe worked longer hours, sent more pandemic emails

■ Change during lockdown

Number of meetings	13%
Number of meeting attendees	14
Average length of meetings	-20
Time spent per day in meetings	-12
Durable increase in workday	8
Change in internal emails	5
Number of email recipients	3
Emails sent after hours	8

Source: Harvard and NYU researchers in National Bureau of Economic Research released study
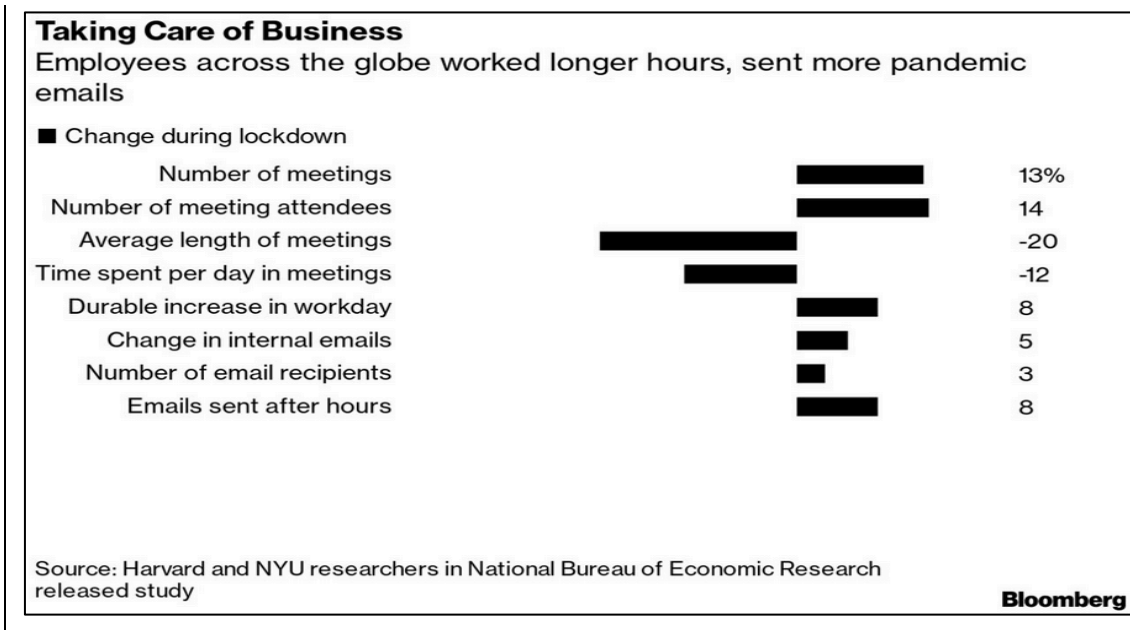
Bloomberg

Figure 3-1 Percentage change in organisational life during pandemic lockdown

The activities of knowledge workers would appear to be defined by practices related to temporality. Formal meetings and commitments can take up large parts of their working day (Kello, 2007). These commitments may be 'dense' in nature as the worker moves from one pre-arranged engagement to another (Newport, 2016). Simultaneously the distractions of office life can impact attention (Leroy, 2009) while the ubiquity of social technologies extends work activities into personal time (Darbyshire, 2018) and blur the boundaries between private and professional lives (Fleming & Spicer, 2004). All the while established temporal routines, habits and practices are part of the make-up of the day (Currey, 2014; Graybiel, 2008; Moran, 2015). These habits and routines are often intimately linked to the practices and identity of the worker (Porter & Nohria, 2018) and can have a significant impact on how time is perceived across the working day (Butler, 1995). As noted earlier this characterisation of temporality as central to the flow of practice is all but missing from dualistic accounts of practice (Sandberg & Tsoukas, 2011). I will return to this in greater detail when discussing the conceptualisation of time in the next chapter.

3.2.2. Operating in the temporality of practice – the link to knowledge(s)

Recognising the temporality of practice is not new. Henry Mintzberg, in his seminal work on organisational life, described the day-to-day setting of the 'manager' in the late 20th Century (Mintzberg, 1980, 2008). He highlighted how managers operated at an unrelenting pace, their activity characterized by brevity, variety and fragmentation. They valued live immediate action and were driven by a forward momentum that was open-ended – no matter what the manager was doing, he or she was plagued by what they *might* or *must* do! This momentum was most often directed towards a constantly emerging future that left little time for abstract discussion and reflection.

Forty years after Mitzberg, the experience of temporality at work has arguably become more intense (Porter & Nohria, 2018). Porter and Nohria followed 27 newly appointed Chief Executive Officers – 25 men and 2 women - as they transitioned into new roles, tracking their use of time over a three-month period. Each respondent had recently participated in the Harvard Business School 'New CEO Workshop', a highly regarded and intensive programme for emerging leaders. The authors found that the working lives of respondents were defined by constant meetings and driven by emails. They were almost always in reactive mode - despite their best intentions respondents had little time to think, plan or reflect; their jobs were all consuming. The findings also exposed a basic contradiction in how respondents spent their time – there was an on-going conflict between existing, familiar practices (which underpinned their existing roles) and the new, less comfortable practices associated with their transitioning role. The challenging relationship with new temporal practices demanded that they *play,* improvise and experiment with their time. Ultimately, whatever the respondents said about their new roles mattered little, what they did with their temporal practices made the difference. Stated simply, it was actions over words.

The temporality of practice would appear to have an impact on the type of knowledge that is valued in the practice context (Weick, 2005). Different 'worlds' of knowledge between theory and practice defined the work of F.J. Roethlisberger (Vaill, 2007). The Harvard social scientist dedicated his career to what he called the *elusive phenomena* – understanding the problematic relationship between theory and practice (Roethlisberger & Lombard, 1977). Roethlisberger concluded that these worlds of 'theory' and 'practice' had different relations to any given phenomenon and that these relationships were defined by different temporal characteristics. Different knowledge *logics* seemed to exist in either world meaning that aspects of the same phenomenon could (and would) be valued differently in either context (Cascio, 2007; Wefald & Downey, 2009). More broadly this perspective resonates with a flow-like understanding of the practice setting (Heidegger, 1978; Winograd & Flores, 1986) and is addressed in greater detail as part of the framework developed in next chapter.

Recognising a link between knowledge and temporality has implications for this study. It implies that the knowledge relationship with any given phenomenon is different in different contexts. What seemed entirely reasonable in one setting (e.g. during a learning programme as the participant makes their change commitment) may not be the case in another (e.g. the workplace after the programme). The 'knowledge' from one context needs to evolve, change in some way in order to be fit-for-purpose in the other setting. This suggests that all knowledge has a context (Bernstein, 2000) and for knowledge to be useful in any context it needs to be recontextualised (Allan et al., 2015; Evans et al., 2010b; Evans & Guile, 2012). This moves us from the consideration of knowledge as a singular unitary concept to the notion of multiple, legitimate, contextual knowledge(s).

This connection brings us nicely back to Transfer's agenda for change, and an intriguing suggestion within this emerging agenda to move away from the generation of 'pure' knowledge on programmes. Instead the authors suggest the need to explicitly focus on translating knowledge to make it fit-for-purpose in the workplace (Baldwin et al., 2017). They recognise that something needs to happen to programme knowledge if it is to be useful beyond the confines of the formal setting. This would

seem to be implicit recognition that the context in which learning takes place (e.g. the programme), and the context where this knowledge is applied (the workplace), are different and need to be actively accommodated. A temporal process of (re) contextualization would appear to be central to this re-purposing.

3.2.3. Where does this leave us?

As a strand of research the transfer of training has produced an agenda for change that is laudable but limited. It has attempted change from within its own perspective but the gaps highlighted hit an inevitable methodological ceiling. I address these limitations in Chapter Five and suggest that process is a more productive methodological route for this study. Furthermore, Transfer's agenda has merit in highlighting the need for greater action orientation in workplace studies. This supports one of the central purposes of this research – the development of a practical tool that makes the complexity of the post-programme context visible and facilitates the practising of change commitments. The evolution and development of a visualisation tool is covered in detail in the second paper.

This chapter has given valuable glimpses into the ingredients for a theoretical framework. Section Two highlighted the rich temporal texture of the post-programme context - the interactive richness of that setting, and the individual that inhabits it would appear to be important in putting knowledge to work. This suggests the need for a non-dualistic theoretical account, a mediating approach that recognises the mutual interaction of the embodied individual with their changing context. It requires an approach that recognises a legitimate role for formal learning interventions and also how the dynamics of the post-programme context challenges the value and validity attributed to formal knowledge. An element of this challenge would appear to involve the role of temporality. This requires a way of making sense of time that captures the plural nature of that experience. In Chapter Four I will describe an approach to recontextualisation refined for an understanding of time,

and placed within an Interactionist perspective. This became the core theoretical frame for the study.

4. Towards a theoretical framework

The purpose of this chapter is to highlight the routes to a theoretical framework for this study. As noted at the end of the previous chapter, the discussions to date have provided some useful threads in this search. This chapter is divided therefore into three sections. Section One outlines the route to a recontextualisation approach, describing the nature of this approach, its benefits and potential shortcomings. Section Two explores a broad conceptualisation of time and provides the basis for a range of (non-linear) temporal dimensions that underpin the development of the temporal tool. It also introduces the concept of a post-programme *timescape* and the role that temporal practices play in relation to the concept. In line with the nature of the interacting individual underpinning this study, Section Three explores Mead's approach to interactionism, his novel approach to time and his connection with a wider relational perspective. Finally, the section concludes by briefly setting the scene for the last chapter in this Paper, the link to a process approach.

4.1.   Section 1: Processes of recontexualisation

4.1.1. Non-dualistic accounts

There is no single, overriding account of learning at work (Olsen & Tikkanen, 2018). Alternative approaches draw upon a broad range of methodological perspectives, conceptual strands and theoretical traditions (Fenwick, 2006). Ultimately many of these rest on differing assumptions about the nature of the individual and how that individual relates to their wider environment and context (Hager & Hodkinson, 2009).

Perspectives informed largely by a sociological tradition broaden the lens on learning (Hager, 2011). These support a view of learning as a complex social construction shaped by the context in which it occurs (Dudley-Marling, 2012). Individuals are judged to learn primarily through engagement in on-going contextual and culturally

grounded activities (Lave & Wenger, 1991). In shifting the locus of learning to the social and relational aspects of day-to-day activity, the dominant metaphor moves from transfer and acquisition towards process and 'participation' (Elkjaer, 2003). Crucially, context is elevated as an active backdrop to learning and application (Langley, 2019; Langley et al., 2013). Learning becomes an on-going social activity, something that is often informal, implicit and tacit in nature. This supports a more holistic conception of the individual, rejects mind-body dualism and recognises learning and activity as a multifaceted embodied phenomenon (Allix, 2011).

A broader lens on learning appears helpful. Seeing the post-programme context from an active, social and relational perspective is useful in painting a more realistic picture of that setting. This conceptualisation however raises a new set of issues. In essence, what is the role of formal approaches to learning? If learning is primarily informal, implicit and tacit, can attempts at formal learning ever take hold in another setting, or are they always in some way tied to a particular context? This fundamental question has led to on-going, highly contested debates about the nature of learning (Hager & Hodkinson, 2009) where the tension between the individual and their social setting is often positioned as 'either/or' (Hodkinson, 2005). Various mediating accounts have sought to find a middle ground (Billett, 2006, 2009; Eraut, 2014) but these often miss explicit visibility of the post-programme context, and with it, any realistic sense of the challenges associated with putting knowledge to work.

Sociocultural theory is often positioned as bridging the gap between learning and activity (Havnes, 2010; Kaptelinin & Nardi, 2018). With its roots in Soviet cultural-historical psychology (Daniels et al., 2007), contemporary developments in activity theory seek to understand the individual as part of a systematic and situated setting (Guile, 2006). Many of these developments are represented by the Scandinavian school (Ellström & Illeris, 2004) and in particular the work of Yrjö Engeström (Engestrom, 2010; Engeström, 2007; Engeström et al., 1999). Engeström's approach is helpful in seeing a central role for formal learning in the change process (Englund & Price, 2018). That said he also appears to struggle with many of the issues associated with making knowledge fit-for-purpose in the post-programme context.

This struggle is nicely illustrated in a series of reflections by the author relating to three case studies in transformational change (Engeström, 2007). Here he highlighted the distinction between the highly motivated modelling phase of participants (as they acquired new knowledge on a programme) and the obstacles and inertia of the implementation phase, when those participants *should* be using that knowledge after the programme.

Case I ' *a way of working initially took shape through enthusiastic problem solving efforts…it somehow lost much of its momentum when put into everyday practice'* (p.26, Engeström, 2007)

Case II ' *the practitioners began to express increasing doubts and misgivings about implementation'* (p.28, Engeström, 2007)

Case III '*the new concepts were enthusiastically received by the management and the experts of the company, but it soon became clear that nobody was willing to take the responsibility for bringing the tools to the shop floor'* (p.32, Engeström, 2007)

These observations are illuminating. Ironically, they seem to reflect many of the issues associated with Transfer, where the journey of knowledge in a single movement to the workplace is seen as enough to bring about change. In effect, the programme 'worked' for participants in all three cases until something had to be done with the knowledge that had been generated in the classroom setting. The participants were highly motivated in those classroom moments but this motivation seemed to evaporate after the formal intervention. Engeström has highlighted this phenomenon as a 'recurring gap' in his empirical findings (Engeström, 2011). He locates a possible solution in the concept of 'experiencing', a mental process of visualisation that seeks to enable participants to 'see' the eventual implementation of their plans (Vasilyuk, 1992). The introspective nature of this solution however would appear to distract from the distinct and legitimate characteristics of the post-programme context and the impact that this context has on knowledge. This was not very helpful for my purposes. Ultimately I needed a non-dualistic, mediating approach to a theoretical

frame that saw a role for formal learning but also the staged 'movement' of knowledge as a legitimate contextualised process. This theme of the knowledge recontextualisation is core to the work of Karen Evans and her colleagues (Allan et al., 2015; Evans et al., 2010b; Evans & Guile, 2012; Fettes et al., 2020) and central to the core theoretical approach of this study.

In 2011 I introduced the work of Engeström to the Senior and Junior Sponsor at Forum as a potential sense-making approach for the *Impact* programme. This introduction did not go to plan. During the session both Sponsors became frustrated with what they considered to be contorted and inauthentic terminology used by Engeström for concepts that were already established and labelled more simply in their field of practice (e.g. 'perspectival concepts', 'expansive', 'knots'). The nature of these 'language games' led to an added, but visceral issue of practical credibility with Engeström's approach (Astley & Zammuto, 1992), an issue that severely handicapped the use of his work within a real-world context.

4.1.2. Putting Knowledge to work through recontextualisation

The concept of recontextualisation suggests that different forms of knowledge have characteristics and 'logics' that play out in different ways, in different contexts (Evans et al., 2010b). The approach is based on the belief that all knowledge, no matter what the setting, has a context (van Oers, 1998). Given a tendency to elevate certain types of knowledge, this elite knowledge (e.g. that generated within the Academy) is often privileged as objective and value-free and develops a preferential, a-contextual aura (Harmer, 2009). Accepting all knowledge as contextual recognises that concepts need to change as they move from one setting to another (Bernstein, 2000). For the purposes of this study it suggests that some form of active re-contextualization of knowledge is needed as participants move between different settings e.g. before, during and after a learning programme. Given this backdrop Evans et al (2010, p. 246) have identified four key forms of re-contextualization that they believe are significant in the design and delivery of learning programmes (see Figure 4-1).

- Content recontextualisation (CR) refers to the 'what' of programme design e.g. the choices made by various actors and stakeholders as to what is included in the programme curriculum.

- Pedagogic recontextualisation (PR) refers to 'how' the programme is delivered e.g. the methods of teaching and facilitation best suited to the delivery of the programme.

- Workplace recontextualisation (WR) refers to how the day-to-day work setting impacts how knowledge ultimately gets put to work e.g. the affordances and support open to learners.

- Learner recontextualisation (LR) refers to the individual learner and how they connect, and integrate learning into day-to-day activity.

Each of the four forms of recontextualisation involves practices, strategies and activities that facilitate putting knowledge to work within particular settings. These strategies have been outlined by the authors with a series of exemplar case studies that illustrate the practical processes of recontexualisation (Evans et al., 2009b).
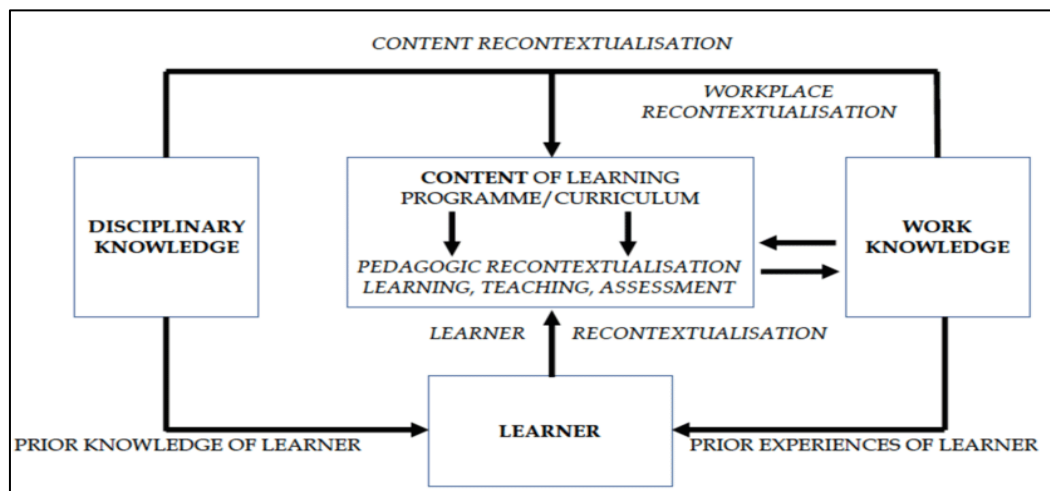

Figure 4-1 Putting Knowledge to work Framework

(Source: Alvunger & Johansson, 2018)

4.1.3. A (big) step forward

Recontextualisation would appear to address many of the methodological gaps highlighted in the review of Transfer. As an approach it breaks with the binary duality of Transfer. The journey of *acquired* learning to the workplace shifts from a single, simplistic movement to on-going, staged processes where the role of context on knowledge is recognised and actively navigated. As a mediated approach it avoids either/or dichotomies while importantly, the individual remains present and visible in their social setting. The nature of this individual however is not some bland object, 'box' or substance (Weiss & Rupp, 2011); she is an interacting, embodied actor, someone with a biography, a history and deeply embedded in her social context (Hosking, 1991; Morley & Hosking, 2003). Far from being a faceless individual this actor has multiple roles in their daily lives and operates on a wide stage, a stage that always has both front and back-stage elements (Edgley, 2016; Goffman, 1974, 1990; Goffman & Berger, 1986; Rosengren, 2015). This portrayal fits nicely with the picture of the *Impact* participant, and their setting outlined in Chapter 2.

Crucially recontextualisation moves beyond the portrayal of the post-programme setting as a 'blank sheet'. In specifically highlighting the realm of Workplace Recontextualisation [WR], the approach opens the possibility of capturing the distinct ontological and epistemological characteristics of that setting, something largely invisible in Transfer (Blume et al., 2010, 2019). It also recognises a role for a range of actors (beyond the individual learner) who have a stake in the processes of re-contextualisation. Programme design and delivery now shifts from a formulaic, value-free and 'objective' activity (Shinall, 2012) to something that is contested and relational involving choice and selection by key actors.

As noted in Chapter One I have found recontextualisation to be a compelling framework in guiding my activities as a workplace educator at Forum. While my approach to programme design and delivery has been informed by multiple traditions, the core features and ethos of re-contextualisation have come to

represent my 'signature' approach - something that has produced distinctive programme structures and generated tangible results (see Chapter 2 and Appendix A). Crucially, the core notion of contextualisation connects and makes sense to stakeholders, suffering few of the credibility issues highlighted with Activity Theory. That said, dropping the 're' (in recontextualisation) has been crucial to achieving purchase with the concept at Forum and highlighted an interesting insight into the understanding of knowledge(s) in practice settings. As a consequence recontexualisation was labelled as 'Constant contextualisation' at Forum (see Appendix A).

More recently developments in recontextualisation have focused increasingly on the worker/workplace and learner stages (WR, LR) of the process (Allan et al., 2015). This has been helpful in addressing some of the key complexities associated with post-programme change.

As noted in Chapter Two, the conceptual content of learning programmes can often be challenging for participants as they seek to establish new practices in the workplace. This challenge can provoke forms of dissonance that require the participant to overcome a *threshold* in their learning and activity (Cousin, 2006). Focus on threshold concepts in management and leadership studies has increased in recent years (Donovan, 2017). This has been linked to a rise in experiential learning (Burch et al., 2014) and the increasing recognition of identity-related transitions within the field (Porter & Nohria, 2018). While to some, the transformative nature of threshold concepts are seen as irreversible (J. Meyer et al., 2010), there is also a view that their mastery has to be seen as an evolving process involving elements of re-contextualisation (Allan et al., 2015). This latter characterisation is helpful. It fits with my own experience that programme learning can be hugely valuable as a first step in fanning the sparks of change. It also puts pay to the image of the *transfer-ready* trainee (Baldwin et al., 2017; Campbell, 1971) and paints instead the picture of a participant navigating the usefulness of their new knowledge over (and in) time.

The immediate aftermath of a formal learning programme often represents a period of 'shock' for participants (Duchscher, 2009; Kramer, 1975). The pent-up commitments at work that may have accumulated during a programme can deliver an untimely reminder to the participant concerning the pressing nature of their current roles and responsibilities (Gee, 2019; Wartzman, 2010). Dealing with this 'shock' generates uncertainty and contradictions for many (Porter & Nohria, 2018), exposing a liminal space where the they are often forced to question the integrity of their commitments. This language of liminality is helpful in making visible some of the psych-social challenges associated with transition (Gennep, 1961) especially in the early days back in the workplace. The link between liminality and recontextualisation is useful therefore in shining a light on the adjustment periods that are often central to change processes (Allan et al., 2015).

Recent research on recontextualisation has highlighted the concept of visibility in illuminating aspects of professional practice (Allan et al., 2016). Specifically, the authors note how the feminisation of nursing (Oakley, 1993), and the devaluation of bedside care (Allan & Barber, 2005) can render important aspects of nursing invisible. The articulation of visibility as a concept in change processes is useful. Formal programme learning is, by its nature, a visible act - it is often conceived as a product or 'thing' specifically located in time and space (Amelia et al., 2015). What happens *after* a programme however is far less visible. Broadening the concept of visibility is helpful in highlighting the need to bring light to the post programme context in a practical and useable way.

While recontextualisation has many of the ingredients of a core theoretical framework, there would appear to be a number of areas in which the approach could be refined.

A range of strategies have been outlined that can be employed productively in the process of Learning Recontextualisation [LR] (Evans et al., 2010b) - these include the use of 'industry educators', 'gradual release', 'learning conversations' etc (Evans et al, 2010. p 249). Personally I have little doubt that these strategies are worthwhile but

there is also a concern in my mind that they are commonplace and well known to hardened 'course-goers'. From experience, there is a strong chance that mid-career knowledge workers have attended a wide variety of formal programmes throughout their career. In many cases these participants can show up on programmes as cynical 'training course veterans' eager to display that they have 'seen it all' before. There would appear therefore to be a premium associated with increased creativity, novelty and variation in the design of re-contextualisation strategies - strategies that challenge participants' taken-for-granted expectations.

Richer descriptions of the post-programme context could enhance the effectiveness of Workplace Recontextualisation [WR]. The granularity of this setting is often a mystery to the workplace educator. What does the experience of this context actually look and feel like in practice? What are the contextual blockages, obstacles and challenges to practising that participants face when they leave the classroom? While the existing strategies of WR recontextualisation e.g. affordances and managerial support, move us on they do little to illuminate the complex, granular *landscape* of the WR setting – the experienced context in which any worthwhile change commitment seeks to take root.

Finally, time as an active ingredient would appear to be missing in the current framework. Putting new knowledge to work in the post programme context has to be seen alongside the existing workplace knowledge of the participant. As highlighted in the last chapter this knowledge is often deeply embedded in the rites, rituals and routines of the individual learner (Currey, 2014; Graybiel, 2008) and tied to the saturated temporality of everyday practice settings. This engrained sense of temporality would appear to lie at the core of a non-dualistic understanding of practice (Langley, 2019; Langley et al., 2013; Sandberg & Tsoukas, 2011), incorporating the impact of temporality more formally therefore within the processes of recontextualisation could further enhance the usefulness of the framework.

Highlighting a potential role for temporality in recontextualisation raises two questions. What do we mean by time and, practically, how might time be incorporated within the approach? I will address these questions in the next section.

4.2. Section 2: 'Time is what the clock says'

The above saying is often attributed to Albert Einstein. Whether he said it or not (most likely not!) these words still touch on something quite profound. They intimate that, through the representation of the mechanical clock, time has become so familiar to us that it is difficult to conceive of it as anything but quantitative, linear and exact. I will suggest in this section that this engrained perspective is not helpful and that, once again, we need to broaden the lens beyond clock time to do justice to the concept, especially when we think about temporality at work.

4.2.1. Linear ('Clock') time

For thousands of years our ancestors had a crude and reliable temporal benchmark as they tracked solar and lunar cycles (Stix, 2002). In the thirteenth century, the invention of the mechanical clock changed everything (Landes, 1983). With this development time lost its fluid, cyclical quality and the introduction of a standard temporal unit heralded an era of increasing precision and accuracy (Castree, 2009). The dawn of industrialization reinforced this standardization. In particular it saw the mechanical clock become the root metaphor for efficiency and performance supporting an understanding of the world that was increasingly underpinned by growth and productivity (T. Watson, 1995). Alongside this, the deeply engrained metaphor of clock time became the organizing principle of modernity (Winner & Mumford, 2010) and the dominant temporal perspective within the physical and social sciences (Butler, 1995). Here our understanding of time is most commonly conceptualised as absolute and objective - a singular, external concept that is precise, measurable and linear (Bunnag, 2017) (Figure 4-2).

The concept of linear, 'clock' time is deeply embedded within organizational life (Sharma, 2014). Time is positioned primarily as a limited and scarce resource, a fixed commodity that requires prudent management in the pursuit of economic performance and gain (Rehman et al., 2019). For many, the working day is a constant stream of tasks, meetings and commitments that need to be squeezed into busy, fast-moving schedules (Mintzberg, 2008). It has become commonplace to paint a picture of the overworked, time-poor executive who is constantly stretched in terms of their use of time (Perlow, 1999). The embedded nature of 'clock' time in organizations has also not stood still. In an era of connectivity and knowledge work the central role of the mechanical clock has been reinforced by other forms of temporal management, most notably the electronic diary and the mobile phone (Ojala & Pyöriä, 2018; Stieglitz et al., 2015)

Characteristics of *linear* time.	Characteristics of *non-linear* time
Time	Time(s)
Unitary	Relativist
Linear	Cyclical
Objective	Subjective
Homogenous	Heterogeneity
Outside the event	*In* the event
Clock metaphor	Multiple metaphors

Figure 4-2 Characteristics of linear and Non-linear Time

4.2.2. Non-linear ('Social' or 'Qualitative') time

Ways of seeing are often ways of not seeing (Berger, 2008; Morgan, 1997). In particular, engrained, historically-situated ways of *seeing* time have the potential of rendering invisible other non-linear dimensions. These broader understandings of time are characterised within the literature under different labels, sometimes called qualitative time (Hassard, 1991), social time (Moran, 2015) or non-linear time (Crystal, 2001; Sleek, 2018). For clarity I will refer to this broader understanding under the catch-all category of non-linear time.

Non-linear time has multiple and diverse facets (Cipriani, 2013). Less clear-cut than its quantitative counterpart it has a rich multi-dimensional quality that is open to interpretation at many levels. At an intra-individual level it may focus on how understandings of time are impacted by our biology (Wright, 2002) or personality type (Myers & Myers, 1995). From a social perspective it can relate to the effects of age (Hancock & Hancock, 2014), generation (Sharma, 2014), gender (Kleinman, 2009), culture (Levine, 2006) or technology (Agger, 2011). It can also play to the situated and subjective processes that impact the perception of time (Flaherty, 2000) or highlight the societal experiencing of time as interruptive or disruptive (Newport, 2016). These broader understandings shift the underlying metaphors of time from precision, standardization and linearity towards cyclicality, rhythm and flows (Crawford, 2016). They also move us away from a modernist emphasis on efficiency, performance and use towards a wider focus on meaning and symbolic sense-making (Flaherty & Fine, 2001). All the while, time shifts from a singular (e.g. time) to a multiple concept (e.g. times) (Figure 4-2).

Talking about *time* and *times* can be confusing. A short practical example of these differing conceptualisations is possibly the best way of bringing them to life. As I sit writing this piece I am aware that I have a fixed (linear) time period available to finish the section. Let's say that this is the afternoon. Enjoying the subject matter however I may find that my subjective (non-linear) understanding of that allocated time period appears less than the whole afternoon allocated. I am in a state of temporal flow and my connection with the topic means that time flies by! But unfortunately sometimes I am not that disciplined as a writer and I leave my mobile phone where I can see and hear it. Constant notifications pulsate through the afternoon interrupting my flow and creating (non-linear) temporal sensations that, although hard to articulate, are deeply experienced. The lack of progress with my writing is testament to that.

Adding non-linear time to the conceptual repertoire changes the way we think and talk about time. For the purposes of this study it also changes the way time can be incorporated into a practical 'picture' of the post-programme context.

4.2.3. The post-programme context as a *'timescape'*

While it is commonplace to refer to a view or vista as a landscape, the image of a timescape seeks to construct and represent a multifaceted and complex conception of time (Adam, 2004a). This 'scape' aims to capture a 'cluster of temporal features, each implicated in all the others, but not necessarily of equal importance in each instance' (2004: 143). These features can include familiar temporal elements such as use and duration, but also less familiar aspects such as interruption, tempo and sequence. A key attraction of the approach is its flexibility. Any number of temporal elements can combine to form patterns of rhythmicity, periodicity and cyclicality in a temporal experience - this gives creative scope to explore, and make visible, those elements of temporality that may be relevant to a particular everyday experience and context (Adam & Groves, 2007).

The post-programme setting can be thought of as a timescape. Building on the elemental temporality of the practice setting (Langley, 2019), it would seem reasonable to segment aspects of this context into distinct dimensions of temporality (e.g. meetings as time 'use', emails as distractions etc). From a review of the literature prepared at the time of the Registration Viva – and supplemented subsequently - there would appear to be five dimensions of time that are relevant to this study. These are labelled, and briefly described below, as Orientation, Visibility, Velocity, Density and Interruptions.

Orientation seeks to highlight the directional preference of individuals as they act in day-to-day settings (Bugaric, 2019; Park et al., 2016). While temporal direction might represent an orientation to the past, present or future (or any combination of these), an argument can be made that the post-programme setting represents a special case of Kierkegaard's maxim of 'living forwards' (Ree, 1998). The primary driver for this dynamic goes to the heart of the financial valuation equation e.g. an organization's worth being the present value of all future cash flows (Berk & DeMarzo, 2013). Under

this temporal framing, little value is placed on past events and time becomes an open-ended orientation towards the future (Mintzberg, 1980).

Visibility aims to capture the level of certainty, and felt security relating to the general temporal setting. For many organizations the external commercial and competitive environment is increasingly defined in 'VUCA' terms (a volatile, uncertain, complex and ambiguous setting) (Euchner, 2013). This way of seeing the world often feeds a mind-set of temporal fragility that can seep into everyday organizational life (Horney et al., 2010). This may undermine the efficacy of past knowledge (e.g. have the 'rules of the game changed'?) focusing attention instead on immediate and forward - looking possibilities (Horney & O'Shea, 2015).

Velocity seeks to capture the perceived pace of the temporal setting (Boersma, 2016). There is often a belief that significant aspects of both work and life have 'sped-up' in recent years (Ulferts et al., 2013). For many, the ubiquity and pervasiveness of information and communication technology have contributed to this acceleration (Wajcman, 2015). This would appear to have implications for the relationship that many workers have with knowledge - to what extent is there time in the working day to think and reflect, and when thinking does takes place, what sort of knowledge is valued? (Basar et al., 2015).

Density seeks to capture how time is employed and used (Coffé, 2015). In everyday organizational life meetings are a significant feature for increasing numbers of workers (Perlow et al., 2017; Scott et al., 2012). These meetings may be face-to-face or virtual, formal or informal, internal or external. In many cases the scheduling of these meetings is not within the control of the workers - electronic diaries are often open and transparent to other members of staff to book and schedule meetings as they see fit (Cross et al., 2016). This has implications for time use (Wajcman, 2018a). To what extent are workers pulled along by the momentum and traction of packed meeting schedules? How might the process play to habitual behaviour and automatic thinking styles? Ultimately, where is the time to practise new commitments if no time available?

Interruptions aim to capture the range and variety of disturbances experienced in a work setting (Leroy & Glomb, 2020; Puranik et al., 2020). The concept is supported by a growing literature in philosophy (Gibbs, 2010), social psychology (Christianson et al., 2008) and learning (Jarvis, 2010). This growth is not without cause. Increasingly workers live a multi-layered existence within organizations. Through the use of information and communication technology many workers find themselves operating in different virtual workspaces simultaneously (Crang, 2010). How does an employee concentrate and focus for any meaningful period of time on these types of temporal settings (Leroy, 2009)?

These five temporal dimensions became the way of thinking about time in this study. Importantly they also became the way of talking about time - this was achieved through their link to social practices.

4.2.4. Capturing time as social practices

The social analysis of time has been refined in recent years to highlight the role of temporal practices in social settings (Moran, 2015). Moran has suggested that linear time hides a multitude of ways in which temporality *functions* in daily life, and insists that non-linear concepts such as duration, access, interruption etc capture aspects of this, deeply experienced, functionality (Moran, p. 283). Crucially these experiences are not just abstract phenomena; they are represented in enacted, material practices that organise the social functions of temporality (Moran, p. 289). Consider once again the example of my writing above. Interruptive temporality most likely manifested itself as an audible ping, a buzzing on the table and a physical message. I could hear it, feel it and see it!

Seeing time as social practices is significant at a number of levels. If a practice is something that we do, a concrete and observable act, then this act is accessible and relatively easy to comprehend. Conceptualising time as a practice act thereby

addresses a recurring challenge faced when researching time - how does a respondent talk about sometime that is simultaneously rich and experienced but seemingly invisible and abstract (Levine, 2006)? This is not a surprising reaction. Ask a person to talk about their relationship with time and they are likely to look at you strangely. Shaped as they are by a commonplace understanding of the concept, they may struggle to see how anything beyond aspects of linearity can be articulated. Ask that same person to talk about *the practices* associated with that same concept (e.g. interruptions in their day) and this becomes a different, arguably easier, exercise. *Interactions* with temporal practices became a way of tapping our symbolic relationship with time in this study.

4.3. Section 3: A symbolic interaction with time

4.3.1. Interactionism, Mead and relational processes

Before finishing I would like to say something about the type of individual located within this study. The core conceptualisation of an embodied individual was largely informed by a symbolic interactionist route [SI] – this basic model was further refined for the role of wider relational processes.

Interactionism is associated with the on-going process of constructing meaning from experience (Merriam et al., 2006). It builds on a variety of philosophical traditions ranging from ethnomethodology (Garfinkel, 1984) and phenomenology (Schutz, 1972) to Soviet cross-cultural psychology and constructivism (Pass, 2004). This study focused in particular on the work of George Herbert Mead (Blumer, 1992). At the core of Mead's approach was recognition that the individual, and their context, are mutually interdependent units - the individual constructs their reality, and their identity, via on-going processes of interaction and negotiation with others (Menand, 2011). Mead rejected what he saw as the crude and simplistic determinism of behaviourism (Flaherty & Fine, 2001). Viewing himself as a *social* behaviourist he conceptualised an additional moment between Stimulus and Response (S-R), a

specious present where individuals have the ability to choose (W. James, 2000; Mead, 2002b; Stone, 2013). No longer driven by blind automaticity this gap becomes the crucial moment of interpretation (S-'I'-R) that builds choice, emergence and agency into the actions of conscious, embodied humans (Emirbayer & Mische, 1998).

This conceptualisation suited the model of the individual underpinning this study. Symbolic Interactionism supports a picture of the individual strongly embedded in their contextual setting (Peirce et al., 1982). It challenges the notion of an autonomous, isolated and sovereign substance – a feature that permeates much mainstream learning theory (Merriam et al., 2006). SI recognizes the subtlety of a two-way relationship between the individual and their context (Blumer, 1992) suggesting that we shape, and are also shaped, by these settings. Through the avoidance of simplistic one-way determinism SI appears to make sense of many features of the post-programme environment. Here participants can often operate in two modes of being – at times active agents and masters of their realities, while at other times, seemingly passive recipients of powerful, external contextual cues. This tension has been referred to as 'fuzzy' determinism (Ragin, 2008), something that provides a line of sight between Mead's work and broader constructionist strands (Puddephatt, 2005). This has established a rich platform for reframing Mead's work in recent years particularly through the contributions of Karl Weick (Langenberg & Wesseling, 2016; Weick, 1995, 2005). Weick's central focus on the gerund ('ing') captures a broad level of relational emergence not normally associated with Mead and Interactionism. Incorporating broader social processes throughout the study (Hosking, 1991; Morley & Hosking, 2003) highlighted a sensitivity to gaps in SI relating to structure, power and institutions (Meltzer, 1975).

Finally, the conceptualisation of time was another feature of Mead's writing that was attractive. His treatment of temporality challenges traditional notions of time as a linear progression from past, present to future, focusing instead on the present as the locus of temporal reality (Flaherty & Fine, 2001). For Mead, interpretations of both the past and the future, shape and are shaped by the present (Mead, 2002b). On-going social interactions open the individual constantly to the problematic meanings

associated with expressions, utterances and gestures. This occurs in the fleeting, specious present, a moment of becoming and emergence where individuals have no choice but to choose. This understanding of time seemed to strike a cord with the contemporary experience. It chimed with a period when the pressures of instantaneous communication (Wajcman, 2018a) and immediate gratification (Panek, 2012) appeared to place a premium on the role of the present in temporal sense-making.

4.3.2. Process as the *thread*

In summary, recontexualisation provides the central theoretical frame for this study. This approach is supplemented by an understanding of time based around five temporal dimensions. The incorporation of temporality contributes to a portrayal of the post-programme context as a timescape, a context defined by embodied temporal practices. Finally, the conceptualisation of the individual underpinning this framework is informed by an interactionist and relational perspective rooting that individual firmly within an emerging temporal context.

The common thread through each element of this framework is process. Recontextualisation, by definition, eschews the notion of a single movement (Evans et al., 2010b). Mead, as a disciple of Darwin, stressed the evolving characteristics of existence (Charon, 2009) while time, by its nature unfolds in multiple forms (Adam, 2004a). Process is therefore central to how reality is experienced, and knowledge is understood in the study and as the core methodology it is the subject of the next chapter.

5. A methodology for understanding(s) and use(s)

The purpose of this chapter is to outline the research design employed by the study and how this design was framed by the considerations of understanding and use. This first section elaborates on the study's core Process approach with particular attention to the need to be close-to-practice <u>and</u> close-to-*practices*. Capturing, analysing and representing data 'in-flight' and 'after-the-event' suggested a combination of prehensive and developmental approaches to Process as well as the use of 'Learning Moments'. It also suggested Process Tracing as the core analytical tool. Throughout the research design, differing ontological and epistemological perspectives had implications for the balance between quantitative and qualitative data, the conceptualisation of quality as well as the treatment of ethical and risk issues.

5.1.   Section 1: Background to the Design

5.1.1. Beyond Transfer - a process methodology

This study adopted a core methodological approach based around a Process design. This approach rests on very different ontological and epistemological assumptions to 'Transfer' and had significant implications for the understanding of the post-programme context and the development of a practical tool within that context.

Process as a methodology tends to sit outside mainstream approaches to practice. Critiques of the mainstream derive from a range of perspectives, many informed by sociological traditions (Adam et al., 2000; Blattner, 2006; Blumer, 1992; Habermas, 1989; Peirce et al., 1982). These perspectives tend to place greater emphasis on the role of context and often seek non-dualistic accounts of the relationship between theory and practice. They also share a common thread in highlighting a link between knowledge(s) and practice (Sandberg & Tsoukas, 2011).

Process theories are systems of ideas that explain how a phenomenon develops, evolves and unfolds over time (Ven, 2007). Underpinned by a very different *worldview* to that of substance metaphysics (Niederman & March, 2018), they tend to view a phenomenon as actively constituted in an on-going, interactive relationship with its context (Farmer, 2002). As such, they are primarily concerned with the sequence of events that lead to a particular, or desired outcome (Langley, 1999).

Process approaches support an ontological position that have interaction and engagement at their core (Shotter & Tsoukas, 2011). They rest in particular on a relational ontology (Hernes & Maitlis, 2010), a belief that *things* have meaning not in their inherent substance but in relation to other *things*. This challenges dualistic understandings of change (Kotter, 1990; Kotter et al., 2011) – entities can no longer be seen solely as separate, stand-alone and discrete, 'acted upon' by some exterior force (Seibt, 2020). These *things* are inherently interactive, relational and evolve over time. Process approaches therefore tend to focus on the journey to an eventual outcome emphasising 'how' as well as 'what' questions (Langenberg & Wesseling, 2016). This gives scope to the researcher to approach understanding from *within* (Hulst, 2020; Hulst et al., 2017) the phenomenon.

Considerations of Process open up different relationships with the nature of causality. Where variance studies tend to emphasize one-way 'push' causality (e.g. x implies y), Process underscores a more interactive, two-way relationship between 'variables' (e.g. x implies y but y also implies x). This has been referred to as *pull-type* causality (Mohr, 1992), something that shifts the understanding of a phenomenon from *being* to *becoming* (Whitehead, 1979). This distinction draws on a rich lineage from Heraclitus (Heraclitus, 2003), to Hume (Deleuze, 2014) and Heidegger (Blattner, 2006; Heidegger, 1978). At the core of becoming is the belief that 'all things flow' – that the same thing e.g. a river or the sun, can have a changing nature. Given that 'things', by their nature, change they can no longer be seen as finished states with a priori qualities - portrayed in such a way only creates abstractions that allow substances to achieve their shape and permanence through the 'fallacy of misplaced concreteness'

(Whitehead, 1979:2). Process sees manifestations of substance as inherently contingent, temporary and constantly in the making. There is now no fixed stable external point outside the process that influences the dynamic (Gergen, 2011; Shotter, 2012), the plural *dynamics* of change are located within the process itself (Hernes, 2012).

Process methodology supported the research questions in this study through a simple, common link. Neither the individual in the post-programme context, nor the development of a working tool, appeared in a fully baked fashion at a moment in time. Both the individual, and the tool that sought to support that individual, evolved and developed over time. Process methodology sought to make that constitutive state of becoming visible.

Process is far from some quick-fix panacea for all the failings of Transfer. Process studies tend to focus at the macro level of analysis with surprisingly few studies focusing on the granular detail of micro-organisational life (Langley et al., 2013). This is a clear gap in the literature. Furthermore while time is central to the nature of process analysis, the conceptualisation of time in the majority of process studies tends to be narrow. Most studies focus on the linear unfolding of time over a period often neglecting other, equally important non-linear elements (e.g. interruptions, flow, pace). These are gaps that this study sought to address.

5.1.2. Close to Practice and *Practices*

In seeking to hold the lens of rigour and relevance in equal measure, this study needed to be close-to-practice (Cooke, 2005). The British Educational Research Association (BERA) defines close-to-practice research (Wyse et al., 2018) as focusing on *'…issues defined by practitioners as relevant to their practice, and involves collaboration between people whose main expertise is research, practice, or both* (p.1). The BERA statement goes on to specify the characteristics of being close-to-practice.

High quality close-to-practice research requires the robust use of research design, theory and methods to address clearly defined research questions, through an iterative process of research and application. The research process will be well documented and the conclusions that are drawn will be appropriate to the strengths and weaknesses of the design, theory and methods used. Such research will draw upon practitioners' and researchers' reflections on both practice and context' (p. 2)

At face value there is little to disagree with this statement. There appears to be an assumption however that close-to-practice research focuses primarily on influencing policy (Fulton, 2018). While policy is clearly important it was not the primary aim of this study. Here the concern was with *practices* (in the workplace) as opposed to strategic, organisational policy (Moran, 2015). In Schön's parlance the study was more about helping people navigate the tangled complexity of the swamp instead of climbing the mountaintop. The differing ontologies of the mountaintop and the swamp raised another issue. The BERA statement seemed to suggest that the nature of the problem to be addressed in close-to-practice research was self-evident to all concerned. As discussed in Chapter Two this did not feel to be in line with the experience of this study. In particular if those on the mountaintop were driven by different dynamics to those in the swamp, was it fair to think that they saw the same problem in the same way (Wefald & Downey, 2009)? This distinction was important as it implied that the concepts of visibility and perspective were important in some way in bridging the gap between the two domains. Finally the BERA definition appeared to be missing a sense of the relational quagmire that being close-to-practice entailed (Cornelissen, 2017; Luscher et al., 2006; Omisore & Nweke, 2014; Walker et al., 2008). If the intention of this research was to tell a credible and grounded story, then that story would unfold, iterate and cycle over time but would always occur within a relational setting that was steeped in differing perspectives and interests (Munyon et al., 2015). These reservations with the BERA conceptualisation suggested that the study was not just close-to-practice but also needed to be close-to-practice(s).

5.1.3. The link between understanding, use and learning moments.

The study's core requirements of understanding and use had implications for the type of the Process design employed in the research design. This design needed to capture the temporal nature of the study (e.g. when was data captured and analysed?) as well as my relationship to that unfolding process over time (e.g. where was the balance between understanding and use at any particular moment?).   This required an appreciation of the connection between process and time.

5.1.4. In-the-flow and after the fact

The first key choice in conducting any process research revolved around how to capture time empirically (Andersen et al., 2018; Langley et al., 2013). Mindful of this choice it is suggested that time and process can be categorized into four ideal types - Prehensive, Configurational, Reconstructive and Developmental studies (Langley & Tsoukas, 2016). Each of these categorizations brings a particular focus to the researcher's relationship with process (e.g. inside or outside the process) alongside the temporal emphasis of the research (e.g. in the immediate flow of the research or engaging after the fact). These four ideal types are captured in Figure 5-1 below.

	From within	From outside
In the flow	Prehensive	Configurational
After the fact	Reconstructive	Developmental

Figure 5-1 Four ideal types of Process Studies

Source: Handbook of Process Studies, p.9.

Understanding and use permeated temporal processes at every stage of the study's design. As an example, data gathered during the initial interviews was used in real time to guide the on-going construction of the tool. This meant that some form of

immediate, real-time analysis took place while the interviews were in flow. In a similar vein, accounts generated by the use of the working tool were employed during the final stage (the 'PPP) to facilitate change with respondents. This located the research design within a *prehension* category of process research. It placed me, the researcher, firmly in the unfolding flow of activity with an engaged ring-side seat (Hussenot & Missonier, 2016). Here I needed to undertake use-inspired analysis as I sought to capture 'reality in flight' (Pettigrew, 1990). This however was not all that was required from the study. I also needed to understand and make sense of this data after-the-fact. As a researcher this now located me within a *developmental* approach to process. I was looking back at events after they had occurred and attempting to bring a different, outside level of understanding to the data. Incorporating these two perspectives meant that the meta-analytical backdrop to the study represented a combination of prehensive and developmental approaches to process.

5.1.5. Learning moments as Process Tracing

The need to capture, analyse and represent data at the two moments of understanding and use provided an operational challenge for the design. How could I productively employ in-the-flow insights from the unfolding nature of data capture ('use') but also allow for post-hoc analysis of these moments ('understanding')? Most of all I was concerned at over-extending my analysis after-the-fact and making the development of the tool, or the unfolding understanding of time, look too neat and tidy. This *progression of understanding* was a key challenge for the study. In essence I needed a way of drawing a line under prior knowledge and delineating what I knew and when I knew it? This was achieved through the use of Process Tracing – an analytical approach employed to draw inferences from the unfolding of events or situations over time (Beach, 2017; Collier, 2011; Ricks & Liu, 2018). Throughout the study Process Tracing placed a premium on balancing stasis with flow, building what Mahoney calls 'careful descriptions' at points <u>in</u> time, that were necessary to illuminate the inferential sequencing <u>over</u> time (Mahoney, 2010). I will expand on how Process Tracing was employed in the next chapter.

Tracing was given operational shape in the study via what I came to describe as 'learning moments'. These represented points during the study when an insight occurred that suggested some form of change should take place. As illustrated in Figure 5-2, an insight during one of the interviews might be used to contribute to tool design, update the *Impact* programme, refine the subsequent interview process or contribute to immediate or post-hoc analysis. Crucially, articulating learning at these points in time placed a limit as to where understanding was at that point. This allowed me to revisit these moments after-the-event for the purposes of further analysis, whilst also respecting the unfolding process of understanding. Learning moments were particularly relevant during the development of the tool but more broadly became an important practical and methodological device for the study.
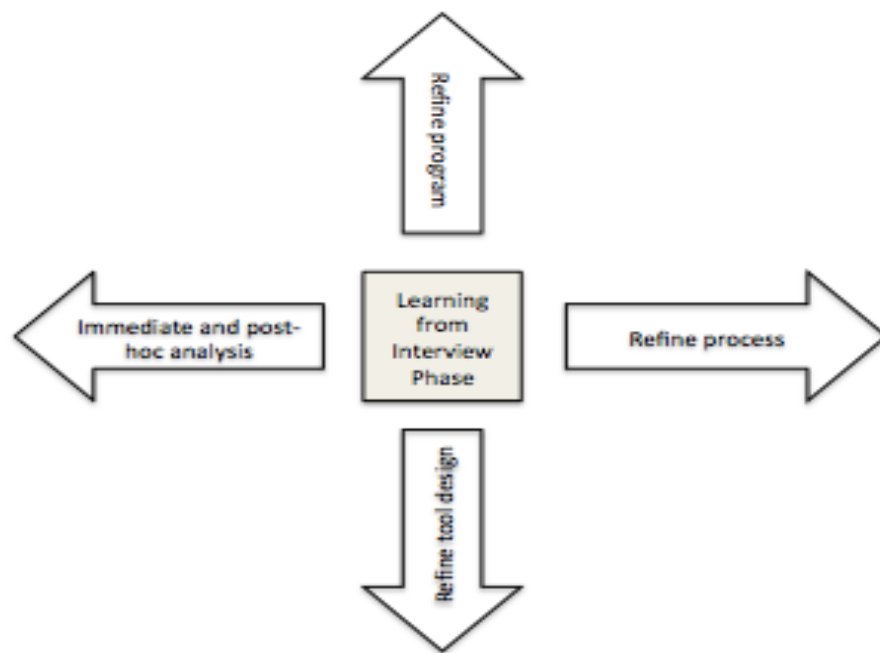
Figure 5-2 The role of on-going learning moments

5.1.6. Ontologies and epistemologies on the mountain-top *and* in the swamp

My worldview is framed by a tension between Constructionist and Interpretivist strands (Norwich, 2020). I tend to be interested in how individuals relate to their

wider social and symbolic settings while questioning the notion of a single objective reality that is separate, distinct and 'out there' (Atkin, 2015). I believe we operate day-to-day like actors, in realities we construct in combination with others (Goffman & Berger, 1986). As actors we are never static or standing still – we are always forced to exist in a state of becoming (Ree, 1998). This means that we often have no choice but to act and face the contradictions, conflicts and dilemmas that action entails; an on-going, contextualised process that incorporates bodies as well as minds (Menand, 2011). Our co-mingled existence with the outside world limits the extent to which any 'individual' is truly autonomous and we tend to construct who and what we are in our relational interactions with others (Hosking & Morley, 1991; Morley & Hosking, 2003). More broadly, I see these interactions located within a wider relationship with society and social change (Adam et al., 2000; Beck, 2000b; Evans, 2016; Woodman et al., 2015). This worldview has implications for what can be considered valid knowledge. Experience leads me to believe that 'knowledge' comes to be valued in different ways by different communities in different contexts. This supports the view that there is not one, absolute knowledge, but multiple *knowledges* at any point in time. As a consequence the pursuit of ultimate truth is noble and worthwhile but day-to-day truth is closer to the classic pragmatist adage of 'what works' (Kelly & Cordeiro, 2020).

The focus on practices in this study meant that my methodological character was not the only benchmark lens. The pursuit of use-inspired research meant the ontological and epistemological beliefs of *others* was also crucial to this research (Tickle et al., 2013). These users were likely to see the research through a distinct lens, one informed by a particular way of thinking and operating in the workplace (Gambetta & Hertog, 2009, 2016). As highlighted in Chapter 3, the respondents at Forum tended to have a specific career and occupational profile – they were steeped in a technical culture that valued objectivity, certainty and hard 'facts'. Quantitative data and understanding was important to them; it sat credibly within their technical and rational worldview. Central to the study's approach was *representing* this world in a way that respondents could understand. As a consequence I required a methodological approach that both respected (and challenged) this worldview (Udwadia, 1986). At the same time I did not have the only say in terms of the voice

used to interpret findings– respondents had to 'see' the tool *in-flight* and make sense of it from their own perspective (e.g. it had to have meaning for them). This had implications for the mix, and sequencing of, quantitative and qualitative data in the study. For ultimate sense-making purposes it meant that a qualitative approach took precedence but this approach was framed, via the use of the tool, in a quantitative fashion.

During its early years (2013-2017) this study was positioned as action research (Stern, 2014). The design had mixed methods characteristics (Ivankova, 2014), simultaneous quantitative-QUALITATIVE strands (Teddlie & Tashakkori, 2008) and a complex notation system (Morse & Niehaus, 2009). By 2017 I had become increasingly uncomfortable with this categorization. The approach often felt formulaic and I was spending a disproportionate amount of time fitting my research experiences into, what seemed like, unrealistic, pre-existing design frameworks. Most of all, the design appeared unduly rigid in doing justice to the flowing, unfolding nature of underlying processes. As a process design emerged I recognised that a combination of Action and Process approaches was a viable, and increasingly popular option (Luscher et al., 2006). This led to the 'final' description of the research as a 'Process study' (with an action orientation).

5.1.7. Understanding and use - dual considerations of quality

For qualitative research the pursuit of 'good' enquiry is often captured in the criteria of credibility, transferability, dependability and confirmability (Creswell, 2013; Lincoln & Guba, 1985). Within my field of organisational studies the accepted formula for presenting qualitative findings tends to follow a version of the 'Gioia' template (Abdallah & Langley, 2011). Mirroring the physical sciences (Strang & Siler, 2017), this suggests a systematic approach to achieving rigour (Gioia et al., 2013) by structuring findings around a theoretical coding frame (e.g. first, second and third order codes).

Following a systematic coding frame is not without risks. Sticking to an analytical recipe can elevate the process of data analysis to an end in itself, where the blind pursuit of rigour instils a degree of 'rigor mortis' in the eventual findings (Eisenhardt et al., 2016). This can generate 'dull and uninspiring scholarship' (Cornelissen, 2017), something that contributes further to the gap between the producers and consumers of knowledge (Astley & Zammuto, 1992; Banks et al., 2016; Ghoshal, 2005). This was a key concern for this study. As an approach to quality therefore the study sought to bridge the need for rigour and relevance. The requirements of understanding and use meant findings had to make a contribution both within the Academy and in the world of Practice. In particular the research sought to do justice to the stories and instances behind the final account that illuminated the complexity of research in practice settings. With this in mind the study aimed to connect with a growing debate around re-imagining quality (Degama et al., 2019).

Research is far from a neutral or straightforward process (Cunliffe & Alcadipani, 2016; Donnelly et al., 2013; Hatch & Cunliffe, 2012; Koning & Ooi, 2013; Peticca-Harris et al., 2016). Positioning the process as such can neuter, sanitize and omit many of the authentic, back-stage accounts that give findings their relevance and meaning (Degama et al., 2019; Punch, 1986). There have been growing calls for increased heterogeneity in how quality is understood so as to highlight the richness of insight from findings (Reay, Zafar, et al., 2019). From this perspective good accounts are not clean and tidy (Vickers, 2019), they actively embrace disorder and messiness (Hurd et al., 2019) and elevate context and process (Luhman, 2019). I sought to tap these accounts via the use of reflective boxes throughout the study. These aim to give greater context to the reader as to how the overall account evolved to that point.

The role of researcher cannot go missing in accounts that seek to bridge rigour and relevance. There is a need for what Peticca-Harris (2016) calls the 'nakedness' (p.397) of the researcher to be exposed. This requires researchers to relax the taboo of the first person, 'share tales from the field' (Cunliffe & Alcadipani, 2016, p.2) and underscore the performativity of the research process (Ashcraft, 2017). With this in mind I have attempted to make visible where, how and why I am located in the study

as it unfolded. The reflective boxes and on-going discussion sections provide the opportunities for this.

> The dual considerations of understanding and use would appear to have shifted the focus of questions usually asked in a Methodology section. Questions of what, how and why remained important for this study in terms of the choice of approach, methods etc. Alongside this however were issues of *when* data was captured, analysed and represented as well as *who* it was captured, analysed and represented for. This meant that the ultimate design had to have validity, and credibility for all sides – a key consideration for the conceptualisation of quality.

This study has been driven by a dual agenda to quality throughout. It aimed to be transparent and disciplined concerning approaches to data capture, analysis and representation whilst also recognising the importance of being close-to-practice(s) and fit-for-use. The intention was to achieve these dual objectives while narrating a grounded and engaging storyline (Golden-Biddle & Locke, 2006) that might connect the realms of theory and practice.

5.1.8. Navigating ethical and risk considerations

I have completed the *Faculties Ethics Review Checklist* and I have read, understood and subscribe to the BERA *Revised Ethical Guidelines for Ethical Research* (2011). In addition, as an academic, I subscribe to the *Statement of Ethical Practice for the British Sociological Association* (March 2002). Finally, as a lay reviewer and board member (Evaluation and Accreditation) for the Royal College of Psychiatrists, I adhere to *Good Psychiatric Practice Code of Ethics*, published by the Royal College of Psychiatrists (CR186, March 2014). Although these latter codes are not directly related to this study, they contribute to my overall sense of ethical sensitivity.

Ethical and risk considerations were a live issue over the course of the research. In particular my role as a semi-insider at Forum, wearing different 'hats' meant that

issues of ethics and risk were often woven into the fabric of daily engagements. As a consequence it was important to avoid the risk of undue negotiation surrounding these issues. This is possibly best illustrated by way of an example.

At an early stakeholder meeting in 2015 the Junior Sponsor questioned the need for informed consent during the study. This caught me off-guard. I felt disappointed by his apparent lack of understanding and a seemingly cavalier ethical stance. Conversations over the following days resolved the 'issue' and the role of consent was underscored. It was clear from these conversations that this position was not something deliberate or calculated on his behalf (Rapoport et al., 2001). Through his lens, he had suggested something that appeared quite normal in his context. The incident underscored the fragility of these moments given the different roles I inhabited at Forum. As both a practitioner and a researcher it highlighted the potential use (and abuse) of power dynamics in seemingly innocuous stakeholder engagements and how these moments cannot, nor should not, be avoided (Meyerson & Kolb, 2000).

To avoid the scope for negotiation around 'ethical space,' an upfront ethical statement based on the Faculty Ethical Review Checklist, was agreed with the Senior Sponsor and included in the research agreement. This also included a statement on risk assessment – an issue of particular importance to Forum given the priority placed around issues of risk and safety within their core business. The statement was expanded to be compliant with Forum's HSSE (Health, Safety, Security and Environment) Control Framework. It was made clear to me during the negotiations of the Research agreement that failure to observe this risk Framework during the research process could have significant implications for research access. There were no items within this Framework at odds with the Faculty Risk Assessment Document.

5.2. Setting-up Paper II

In Chapter One I mentioned a strong hunch from my practice that something happened to well-meaning change commitments in the workplace after formal learning programmes. This was one of the key motivations behind this study, As I gazed out from my semi-elevated position on the side of the mountaintop it looked as if the messiness of the swamp had challenging consequences for the knowledge generated during programme learning, even after a highly regarded and 'successful' programme like *Impact* at Forum.

This fostered the belief that a learning programme was not the finished article in a participant's journey towards putting knowledge to work in the workplace - the participant relationship with their change commitment appeared to unfold further as part of the post-programme context. Furthermore this rich contextual experience appeared to be linked in some way to the understanding and impact of time. In order to move forward there was a need to make this understanding of time more visible and locate it within a context-based approach to post-programme support. This begged a question as to why a different approach to post-programme support would make a difference? Before closing this Paper let me say a few words about why the contextual character or support is potentially so important.

As highlighted in Chapter Three the interventions for supporting post-programme change commitments tend to be limited (Blume et al., 2010). These usually take the form of one-to-one coaching or some type of peer/ supervisor interaction (Bright & Crockett, 2012). One-to-one coaching has become increasingly popular in recent years (Losch et al. 2016) and is often employed by organisations to support both individual and wider change initiatives (Grant, 2014). This form of coaching however can be expensive (Meuse et al., 2009) and there is mixed evidence surrounding its impact and effectiveness (Lawrence & Whyte, 2014). More broadly the emphasis of current coaching approaches tends to focus on intra-individual factors with little explicit emphasis on issues of context or workplace setting (Grover & Furnham, 2016). This characterisation plays to a model of the individual as autonomous, sovereign and self-contained – a characterisation, as outlined in Chapter Three, which appears to be highly unrealistic. There is little room in this characterisation for the embodied

interacting actor, someone deeply embedded in their temporal context. This, I suspected, was a significant issue with the existing forms of post-programme support at Forum. As discussed in Chapter Two there was (very) low take-up on coaching after *Impact*. This was the case despite the encouragement of Forum management and the established reputation of the professional coaches involved. My hunch was that the post-programme temporal context got in the way. This was the gap that the tool in Paper II sought to fill. However, all of this was still in the realm of speculation. There was a need therefore for evidence that increased both the understanding of this context, and in line with the mandate of the study, created something practical that facilitated use.

The pursuit of credible evidence underpinning understanding and use, and how it was employed to develop something practical is the story outlined in Paper II.

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Appendix A   Detailed description of *Impact*

Detailed Description of the *Impact* programme

Below is a detailed day-by-day description of the *Impact* programme as well as the pre and post programme activities.

Please note that each of the pedagogic beliefs referenced in Chapter two are mapped onto their respective programme practices via the use of a **red** identifying number [e.g. contextualization = **[1]**)

[1] = **Context**
[2] = **Identity**
[3] = **Contradictions and assumptions**
[4] = **Support**
[5] = **Knowledge**

Impact pre-program activities

A formal kick-off (30 minutes) takes place two weeks prior to the start of the face-to-face component. This session aims to model the tone and character of the face-to-face sessions in being clear, pacey, informative and energetic.

The key elements of participant pre-work are introduced during this call.

- Participants are asked to reflect on their external commercial and competitive environment. They are required then to provide a short detailed account of this setting and its implications for them as deal-makers **[1]**

- Forum has identified a series of specific deal-leader competencies (as well as general leadership attributes) that are relevant for this community.

Participants select a competency or attribute that they will focus on during the programme outlining why it is relevant to their development. **[1]**

- Participants arrange a meeting with their line manager before the face-to-face to ensure alignment around development as well as to harness managerial post-program support. This date of this follow-up is scheduled before the face-to-face session**. [4]**

- Participants are asked to provide a recent picture for a class 'face-book'. They are also encouraged to review the internal biographies of other participants as well as to be aware of the latest developments in Forum's strategy. **[4]**

- Finally they are required to review a specially prepared video / podcast on orthodoxies hosted by Barry Rogers. **[3]**

Pre-work is submitted (a minimum) of one week before the start of the face-to-face component to allow faculty (internal and external) to review the requirements and needs of each participant. **[1]** All internal and external faculty members are briefed by the programme orchestrator and the programme director during the two weeks prior to the start of the face-to-face. This is accompanied by a written brief that includes desired objectives, outcomes, description and choreography for their particular session.

Impact face-to-face programme

The face-to-face component of the programme is four days long and runs from Tuesday (08:00) to Thursday (16:00) in the same week. There are usually five separate runs of the programme spread evenly across a calendar year.

The programme content is outlined in the diagram below – the content aims to build in a sequential manner over the course of the face-to-face component.

Day I

Day I opens with an interactive and participative activity (1 hour) that links the pre-work submitted by <u>each</u> participant to the themes and outcomes of the week. This is the first in a series of formal 'contextualization' moments that occur over the course of the programme. **[2]**

The programme is based around two full day (Day 1 and Day III) customized simulations **[1][2].** These experiences aim to mirror the real-life setting of learners. Both have been designed specifically for the programme, employing external professional actors who have a ten-year + association with the programme. These actors work to a multi-level brief that gives them flexibility to ad-lib around the unfolding situations they encounter in their interactions. The actors are drawn from a mix of backgrounds and cultures so as to reflect the demographic and real-life situation of learners [Note: participants routinely give feedback that the immersive nature of the activity convinced them that the actors were real clients etc]. Both simulations provide the opportunity for participants to test, challenge and practise what they do, and most importantly what they would like to develop in their day-to-day deal-making.

The core of Day I is taken up with the first simulation. Participants are arranged in three teams and interact individually and collectively with a range of 'stakeholders' (e.g. actors) throughout the day. These interactions take place face-to-face and over different forms of mediated communications (e.g. telephone, chat). In order to place all participants on an equal footing, the Day I simulation is based around a non-Forum scenario. To maximize the learning potential, participants stay in the same teams for the simulations on Day I and Day III.

During the simulation a group of three internal Forum coaches are assigned to the simulation groups (e.g. one coach per group) [4] The coaches act as a 'fly on the wall' over the course of the day – they deliberately do not intervene in the activity but facilitate an after-action debrief for their group at the end of the day. They also

provide one-to-one feedback to individual group members if requested. At the end of the session each internal coach will write-up their personal observations of the group activity (e.g. individual and group dynamics) and provide this to the external coaches (for Day three and four) by noon the following day.
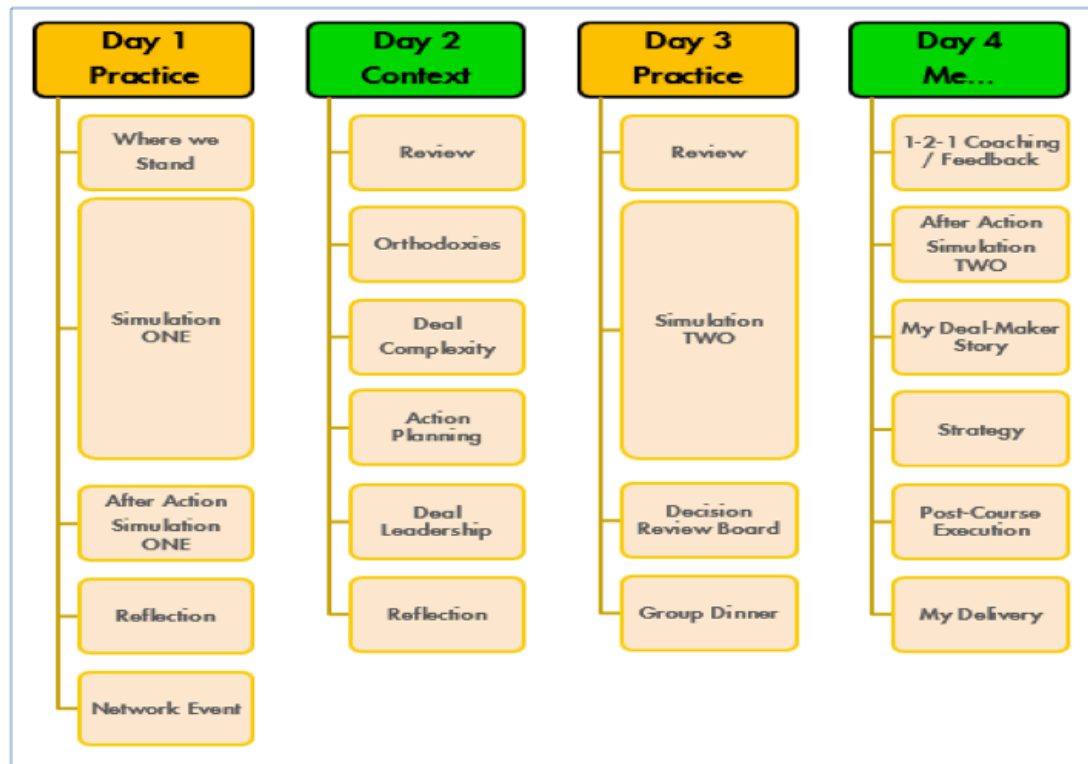
Source: ████████████████

Day II

Day II provides an opportunity for reflection and sense-making between the simulation of Day I and Day III. It also aims to refine key programme themes (e.g. 'orthodoxies') and model deal leader behaviours. The programme moves back into to a traditional plenary setting for Day II.

Both Day II and III start with a reflection session in plenary. This is based around a series of individual 'learnings' gathered from each participant at the end of the preceding day. [1] [5] This exercise provides an opportunity for myself as programme

facilitator to ensure that all participants get their 'voice in the room' (e.g. they are asked to comment on their reflective learning in plenary). The on-going process of capturing, documenting and storytelling surrounding these reflections contributes to the construction of the *informal* programme narrative over the course of the four days; something that is shared with participants at the end of the week. To emphasize real-world quality of programme content, this session also links key programme themes to on-going events that have emerged *outside the classroom* overnight**. [1]**

Following this reflective session participants explore the role of orthodoxies in deal-making at Forum **[3]** This session aims to highlight the powerful role that assumptions play in framing the opportunities and challenges facing dealmakers. It underscores the centrality of challenging deep, taken for granted assumptions (at multiple levels) if sustained change is to be achieved.

Modelling the behaviour of senior deal-makers is a key feature of Day II **[4]** Before lunch a highly regarded veteran dealmaker leads a session that aims to highlight the practicality, and importance, of operating with a growth mind-set in an increasingly complex world. After lunch participants then meet with three of the ▮▮▮▮▮▮▮▮ ▮▮▮▮▮ **[4]** These leaders have fulfilled advanced deal-making accreditation and are responsible for some of the most complex transactions in Forum. This session is not pre-formatted and participants have the freedom to discuss whatever they consider to be relevant over the course of 90 minutes.

For the final activity of Day II, participants reform into their 'simulation' groups from Day I and are each joined by an external professional coach. These coaches leads a session with their assigned team reflecting on the activities of Day I and II and preparing for Day III. **[4]**

Day III

Day III of the programme provides a second opportunity for participants to practice deal-making behaviours in a 'live' simulative setting. **[1] [2]**

The scenario for the simulation on Day III is based around a complex commercial opportunity and involves multiple potential deal constructs. This uninterrupted whole-day experience (08:30-18:00) mirrors the character of emerging opportunities facing Forum. To match the authenticity of a 'real' deal situation, participants are joined by three senior *Forum* dealmakers. **[4]** These dealmakers are available throughout the day to provide support and expertise to each team as needed. Mirroring Forum's governance process these dealmakers operate as a collective review body during a formal feedback session in the middle of the day (45 minutes per team). They also act as an evaluation/feedback panel in plenary at end of the day (90 minutes). Participants receive feedback during the final plenary session from the lead actors and the dealmakers.

Day IV

Day IV explores how participants can realistically embed personal change once they return to the workplace.

During the first activity on Day IV each participant receives one-to-one feedback from the external coach that observed the simulation activity on Day III **[4].** After this the coach facilitates an 'after-action' review session with the wider team. The high-level reflections from this session are then shared with the whole class in the plenary room. **[4] [5]**

The role of storytelling is a thread throughout the programme. Given the transformative nature of the programme, participants are encouraged to explore and refine their individual change stories throughout the four days. This process culminates with the production of a short video from each participant as they finalize their personal commitment on Day IV. **[5]** The theme of narrative is further explored

by a session from Forum's Strategy director exploring Forum's evolving strategic story. **[5]**

Post-programme commitment setting is an important part of the final afternoon (3 hours). Here participants produce a working draft of their personal change commitment and then seek constructive critical feedback from colleagues that have worked closely with them over the previous three days (e.g. in their 'simulation' group). **[4] [5]** Ahead of this, the real-life challenges associated with implementing personal behavioural change is explored. This underscores the crucial requirement of disciplined practising in order to sustain meaningful behaviour change.

Programme feedback is provided via an online assessment form at the end of Day 4. On-going adjustments are made to the programme throughout the year on the basis of the feedback as well as the requirements of changing business needs. To ensure that the programme strategically remains fit for purpose there are two full-scale reviews of content and contributors at mid-year and year-end. Additionally the cross-business steering committee of senior leaders meets on a quarterly basis to advise on changes to the programme.

Impact post-program activities

Participants undertake a series of activities after the programme that are aimed at embedding the learning commitments.

- All participants are required to meet with their line managers to discuss their post-programme commitments. This meeting is scheduled, and shared with faculty before the start of the programme **[4]**

- Each participant has the option for a 30-minute follow-up call with their external coach **[4]**

- Participants are nudged, via a sequenced set of online reminders, to follow-up on the key elements of their programme commitments (e.g. use of their video, reflecting on their journal**). [1]**

- Participants are strongly encouraged to maintain contact with other members of their 'simulation group' in order to provide peer support through their respective change journey. **[4]**

Paper II

Development of the tool

'Doing something is also about making something'

Karen Lee Ashcraft. '' *Submission to the rule of excellence''*, Organization (2017)

Paper II of III

Barry M. Rogers

The mountaintop and the swamp; the role of time in the practising of change commitments after a customised executive education programme

Overview of Paper II

The visualisation tool took shape over five years between 2013 and 2018. Paper II is the story of that development.

The paper builds on the research design outlined in Chapter Five of Paper I. The intention is to capture the nature of process in two ways. First is the need to highlight the *growth in understanding*. This understanding is related to the two key themes underpinning the research questions – the role of time ('Time') and the development of the tool ('Tool'). It sought to explore *what* I knew and *when* I knew it over the five-year period. This growth in understanding then supported the second element of the process, *how* the relevant knowledge was represented in the *evolution and development of the too*l.

The Paper is divided into two sections. In the first section, the conceptual basis for tool development is outlined from the perspective of data representation, data capture and data analysis. In this section I lead with data representation as it assumed a degree of priority in establishing the staged periodicity of tool development. In the second section, the evolving visual representation of the tool is explored over six periods between 2013 and 2018. Periods Four, Five and Six represented the first working versions of the tool. Periods Four and Five are therefore supported by embedded descriptions and discussion of the data capture and analysis that lay behind those stages (e.g. 'Tool Design' and "Tool Pilot" interviews). Learning from the on-going process of capture, analysis and representation was constantly recycled into the development of the tool. Before the tool was finally employed, a set of mini-interviews sought to capture the temporal experience of the immediate post-programme context. These interviews painted a picture of the challenges facing respondents in practising their commitments at this early period. They also facilitated a rudimentary satisfaction curve to gain an understanding of the level of practising in the absence of the tool.

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6. Evolution of the Visualisation Tool (2013 – 2018)

Three key objectives lay behind the development of the tool in this study.

First, the tool sought to achieve a practical and usable outcome from the findings of the study (e.g. to answer both 'what' questions of understanding and 'how' questions of use). Second, it aimed to facilitate the disciplined practising of post-programme change commitments through the use of a novel approach to context-based support. In doing this, it sought to facilitate *a symbolic interaction* with time that challenged existing, taken-for-granted temporal assumptions. The hope was to enable experimentation in a safe, liminal setting and support a process of temporal recontexualisation.

These were the formal objectives of the tool. The analysis surrounding data representation problematized the idea of a single set of users for the tool. I will return to this in the discussion section.

6.1. Section 1: Data Representation

6.1.1. The electronic diary: nexus of time, practices and identity

The development of a context based tool was built around an increasingly common feature of contemporary organisational life - the web-based electronic calendar (Feddern-Bekcan, 2008).

In recent years the engrained nature of organisational 'clock' time has been buttressed and supplemented by the growth of the electronic diary/calendar

(McKechnie & Beatty, 2015). For many workers some form of e-calendar acts as a window on their efficient time-use, and gives an insight into the organization, scope and pattern of their daily working practices (Wajcman & Rose, 2011). As noted in the original objectives, this tool had a different focus - it sought to enable experimentation with time by highlighting temporal practices that supported the practising of change commitments.

This use of a diary format was based on a belief that the biography and history of an individual are in some way reflected in how they currently use their time. This has implications for the process of change. If the individual wants to <u>be</u> someone different then at some stage they would need to start <u>doing</u> something different. This would mean that how they spend their time would have to change, often with implications for their identity (Ibarra, 2004, 2015). At this moment of change, doing something different becomes an investment in their future self. With this in mind, the logic of the tool was to make the linkage between time, temporal practices and identity more visible to the individual.
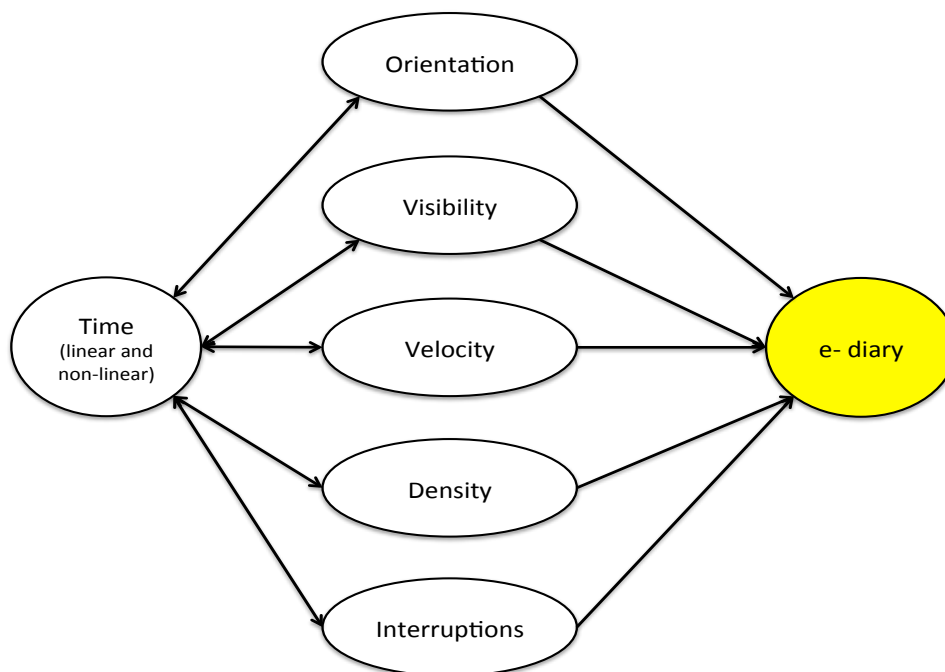
Figure 6-1 Mapping the five temporal dimensions to the e-diary

Differing degrees of temporal visibility became a defining feature of the tool design. The five temporal dimensions outlined in Chapter Four – 'Orientation', 'Visibility', 'Velocity'. 'Density' and 'Interruptions' – provided the building blocks for the visual representation of the tool (Figure 6-1) and the basis for its evolution over the period of development. In practice a range of differing labels were employed to describe these dimensions throughout the design process. These changes were an inevitable process of trial and error in order to specify the most appropriate way of positioning the dimensions with users. For clarity I will endeavour to highlight to the reader where these changes occurred.

6.1.2.   **Positioning visualisation in the study**

Visualisation played a very particular role within this study. It is worth giving some background to this before we proceed.

There is increasing attention to the visual dimension across the social sciences (Meyer et al., 2013). Within the field of organisational studies however the use of visuals is still in the early stages of development – something that is often attributed to the lack of a common language for analysis and a coherent research agenda (Davison et al., 2012). This is not the case for other traditions; be it sociology (Rose, 2013), psychology (Padilla et al., 2018), art history (Berger, 2008; Gombrich, 2004) or communications (Helmers, 2004); each of these fields draws on rich visual traditions.

Within mainstream academic research visuals are most commonly employed as passive additions to verbal texts (Miko, 2011). This study built on the belief that visual representation holds greater 'active' potential as a medium (Pauwels, 2005). This position suggests a need to be imaginative and creative in the use of visuals, moving beyond crude, basic diagrams and simple representations (LeBaron et al., 2018). In particular it develops a stance that the active performativity of visuals gives them a distinct mode of communication, an ability to construct, maintain and transform meaning (Kress & Leeuwen, 2001). This potentially enables visual images to connect

with deeper levels of consciousness during interviewing, moving beyond the exclusive link between words and meaning (Harper, 2002). It can also facilitate a level of articulation in areas where pure verbal communication is limited, restricted or constrained (Slutskaya et al., 2012). This seemed highly relevant for the discussion of time, an area that is often deeply and viscerally experienced, yet as noted in Chapter Four, hard to talk about.

Visualisation and time are intimately linked. The mechanical clock is only one, very particular, visual representation of time (Mumford & Winner, 2010). The link between the clock and how time is physically represented has become so commonplace that arguably, we have lost the ability to see how time might otherwise be represented (Adam, 2004). This does not need to be the case. More generally our tendency to understand abstract concepts such as time by using metaphors from more concrete and experiential domains (Boroditsky, 2000) provides a range of possibilities for visualisation. Growing theoretical grounding (Boroditsky, 2001) for this link opens up a connection between how we think, talk and 'see' taken-for-granted temporal concepts and how they might be visualised beyond the limited representation of a clock/diary.

In making a link between visualisation and time it is important to understand what we are trying to achieve. Meyer et al (2013) have identified five ways of incorporating visuals into research designs, labelling these as Archaeological, Practice, Strategic, Dialogic and Documenting approaches (Figure 6-2).

	Archeological	Practice	Strategic	Dialogical	Documenting
Relevance of visuals	Visuals are artifacts that "store" and "transmit" the social knowledge of a specific community or society and, thus, retrospectively allow for a reconstruction of the meaning structures they materialize	Visuals are socially meaningful material objects that are created, employed, and manipulated in organizational contexts, making them a constitutive part of social practices	Visuals are symbolic devices that exert influence and impact on audiences' perception and evaluation of reality; they are a means of persuasion	Visuals are "triggers" that speak to deeper elements of human consciousness and, thus, elicit richer information from interview partners—and/or more egalitarian forms of communication	Visuals are a form of capturing the researcher's "perspective" on a phenomenon, conserving it in a particularly rich way; they are, thus, well-suited means of documentation and presentation of such perspective

Figure 6-2 Five approaches to incorporating visuals in research design (Meyer et al, P. 503)

This study was located primarily within a dialogical approach. At a basic level it employed visuals as a means of triggering rich responses from interview respondents concerning hard-to-talk-about experiences (e.g. time). There was however another aspect to the classification. Triggering a meaningful conversation with the respondent was only the first step, the approach also needed to make a tangible link to the respondent's temporal practices. This suggested that the design was concerned with an approach that was both dialogical and performative.

6.1.3. The e-diary as a diagram

In developing a diary-based visualization, I required a rigorous approach to design for a particular type of visual – a diagram. A diagram is a simplified drawing showing the appearance, structure, or workings of something (Oxford online dictionary, 2020). As such a diagram shares many of the properties of both written text and representational forms, but it cannot be reduced to either of these (Blackwell, 2013). Furthermore a diagram does not accurately imitate the appearance of a thing or object, there is some licence employed in how that thing or object is represented (Ittelson, 1996). In essence a diagram acts to model the reality of an object as we commonly understand it (Kazmierczak, 2000). This is a feature that makes diagrams particularly suitable for the visualisation of conceptual knowledge (Crilly et al., 2006) breaking down the potential complexity of a concept in a way that connects with more commonplace understandings. This feature tends to give diagrams their distinctive power - the potential to modify the representation of a problem situation [Blackwell, 2013, 1]. It is also a feature that is particularly useful when thinking and talking about time as they can facilitate a process of unlearning as well as learning (Hislop et al., 2013).

The hybrid nature of diagrams leads to an analytical challenge - neither linguistic nor perceptual theories are sufficient to explain them (Blackwell, 2013). This raised an issue when I first sought to design the tool. How could the process of design be guided from a robust theoretical perspective but still be useful in practice? Both

academic and practical perspectives were well represented in the visualisation literature but, with a nod to Schön, each tended to focus on their place on the mountain. On the one hand there were theoretical approaches that were highly technical and complex, but arguably not that relevant from a user perspective (Shin & Mumma, 2018). Alternatively there were numerous popular approaches that provided basic, but ungrounded rules for design (Duncan, 2013). This made the initial exploration of the field challenging; approaches were either too technical or too simplistic. It became increasingly clear that the design required an approach somewhere in the middle, somewhere that bridged the extremes of rigour and relevance. At the same time, as a novice in visualisation, I needed something that could guide me through the multiple choices and trade-offs I would face in designing a robust and credible diagram. This led me to Green's *Cognitive Dimensions* of Notation approach (CDs) (Green, 1989), and in particular to a modified form of the Cognitive Dimensions called the *Pattern Language* framework (Blackwell 2021, in press).

6.1.4. An analytical framework for diagrams: the *Pattern Languages*

Pattern Languages (Alexander, 1978) are built around an architectural analogy - they aim to highlight the different types of user experiences that operate in and around a particular structure. An architectural design (e.g. an office building) is a physical structure with certain features and characteristics that define it (Ashkanasy et al., 2014). This physical structure is likely to have an impact on someone as they use or interact with it (e.g. how does the design or décor of an office make the person feel as they walk into it for the first time (Bernstein & Turban, 2018; Paoli et al., 2019)). A diagram is also a type of structure – an information structure that has certain defining features and elements (e.g. a particular colour, shape and set of directions). Ultimately the experience of using a diagram and engaging with a physical structure are similar – we tend not to separate the isolated elements of their design but have a combined reaction to how these elements relate to one another during the process

of interaction. During this process different patterns of experiences tend to be related to different types of usage (e.g. when we go to the washroom we are unlikely to be impressed by the ambient colouring if the toilet does not work). This link between usage and experiences is central to the *Patterns* logic and functionality.

The *Pattern Languages* provided the analytical underpinning for the development and use of the visual tool. As a framework they performed two analytical functions. The first was to provide guidance during the initial design process. I required a framework that increased my sensitivity to a range of design activities and experiences and gave me an analytical language to work with. The second function involved the process of visual sense-making. I needed a way of critically understanding the processes involved in the design of the tool *after* it had been constructed (e.g. once the tool had been built and employed as part of the study). As outlined in Chapter Five, these methodological features connected with the study's overriding driver in combining process with temporality (e.g. that any framework needed prehensive and developmental characteristics in providing design guidance both in-the-moment and after the event).

Generally the *Pattern Languages* were particularly relevant as a design framework for three reasons. As a non-professional designer the approach was helpful in providing guidance, as well as raising awareness and sensitivity to the trade-offs and choices involved in the design process. The approach also chimed with the need for a de-centred, contextual approach to tool design (Blackwell, 2020 in print) and its core interactionist orientation, connected with the central theoretical thrust of the study.

6.1.5. **Overview of the *Pattern Languages***

The *Pattern Languages* (hereafter called the *Patterns*) are built around three types of activities that are typically engaged in when someone uses a diagram. These activities involve Interpretation (e.g. reading information structures), Construction (e.g. building information structures) and Social Activities (e.g. sharing information structures). These Activities are subdivided into various sub-activities. As an example,

Interpretation Activities can be made up of the ability to search for, compare and make sense of data. At the same time, Construction Activities might involve different ways of manipulating diagrams e.g. modification, exploration or transcription, where Social Activities highlight elements from collaborative contexts including the ability of the diagram to illustrate a story, organise a discussion and persuade an audience.

Finally, each sub-activity is linked to a set of Experiences that are likely to be relevant for users of the diagram as they interact with it. These 'Patterns of (User) Experience' include the experiences of visibility, structure, meaning, interaction, thinking, process and creativity. Within the Pattern framework each of these experiences is broken down to describe the nature of the different types of experiences.

6.1.6. Operationalizing *Pattern* analysis
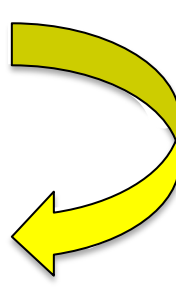
A draft copy of the most recent *Patterns* framework was received from the author, Professor Alan Blackwell (Department of Computer Science, University of Cambridge) in July 2017. To arrange the framework in a usable analytical form the three elements of the Pattern structure (Activities, Sub-Activities and Experiences) were summarized on a single Excel page (see Figure 6-3). In line with the dual analytical logic of this study (prehensive and developmental orientation) these Excel sheets acted as my reference point for design considerations <u>during</u> construction of the tool, and for sense-making <u>after</u>-the-event.

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaboraive contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look
CE4	Anything not forbidden is allowed

Figure 6-3 Layout of Excel Spreadsheet with Patterns

Arranging the Patterns on a single Excel sheet was central to the process of analysis. As the tool developed I was able to repeatedly revisit this page to label what type of visual Activity or Experience was in evidence at that moment. As I did this, I highlighted in yellow the Activities, sub Activities and Experiences that were relevant. Practically this allowed me to come back at the end of the design to see how the Activities and Experiences had changed over the course of the tool's evolution and development. In this way I could literally 'see' the different patterns of visual Activity and Experience as they moved and changed.

Figure 6-4 Transition in format of Patterns from Period 5 to Period 6

I revisited the *Patterns* repeatedly throughout the study in order to locate which criteria (e.g. user Activities and Experiences) were guiding design decisions and trade-offs. Initially I highlighted a full and comprehensive set of criteria as I encountered them. This however proved too lengthy and complex and I ended up prioritizing 3 to 5 criteria in total for each of the six visualisation periods – these criteria are highlighted in the short narrative at the start of each period in the visualisation

review. The process of revisiting the *Patterns* was fuelled throughout the study by a background realisation that something (e.g. logic, drivers behind the diagrams) had changed and I needed to understand the design criteria involved. This became the crucial link between data capture and analysis, and the process of data representation. Something in one domain stimulated curiosity and investigation in the other, and vice versa. In this way on-going data capture, analysis and representation were interconnected and as the study progressed this process became a disciplined part of the analysis.
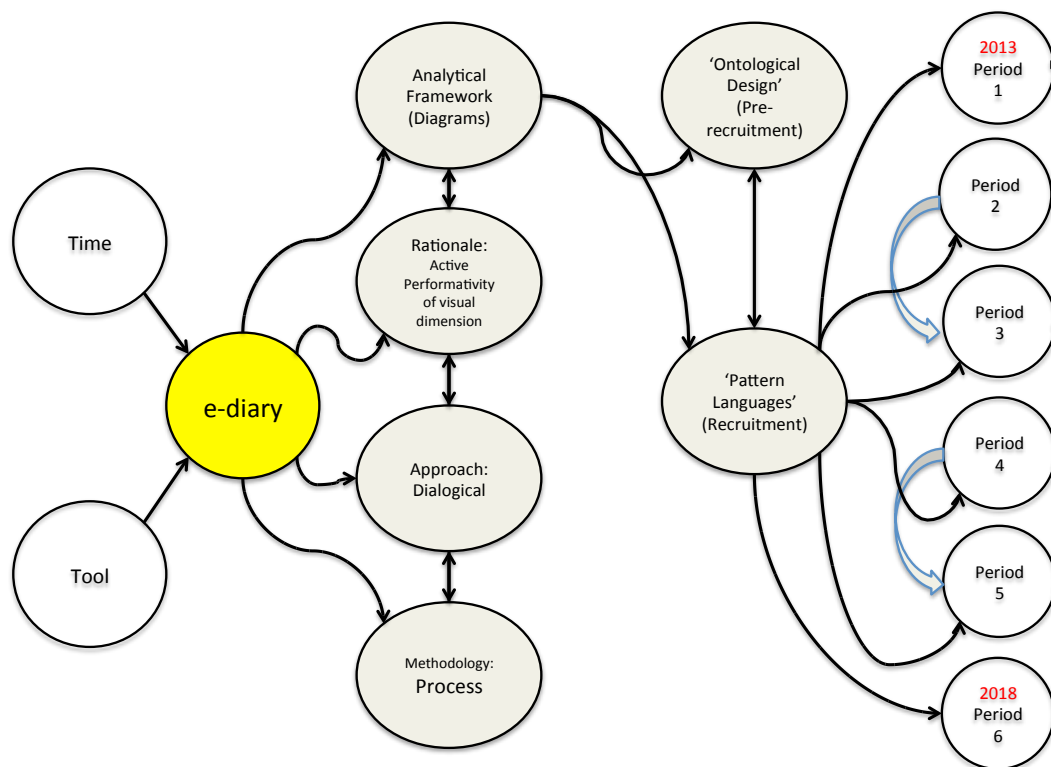
Figure 6-5 Overview of visual representation process

To summarize Figure 6-5 illustrates how the output from data capture and analysis (involving the core themes of 'Time' and 'Tool') fed into the visual representation of an e-diary tool. This process of design was framed by a dialogic approach and a belief in the active performativity of visuals. A *Pattern Languages* approach to diagrams guided the development, use and sense-making of the tool over six periods between

2013 and 2018. The nature of the interconnecting lines between the various components indicates that many of the constituent features had a simultaneous character.

6.2. Section 2: Data Capture

6.2.1. Overview of Data Capture

The previous section highlighted the interconnected relationship between data representation, capture and analysis. Let us look in more detail at the forms of data capture and analysis employed and how they supported and drove the process of representation.

Data capture and analysis for this study took place between 2013 and 2018 (see Figure 6-6). In the early period of the study (pre-Registration Viva in 2017), understanding of the research context was driven primarily by observations from practice and pilot investigations. As the study progressed (post-Registration) the need for more formal capture (e.g. interviews) and analysis became relevant. Note- taking was employed over the whole period of the research.
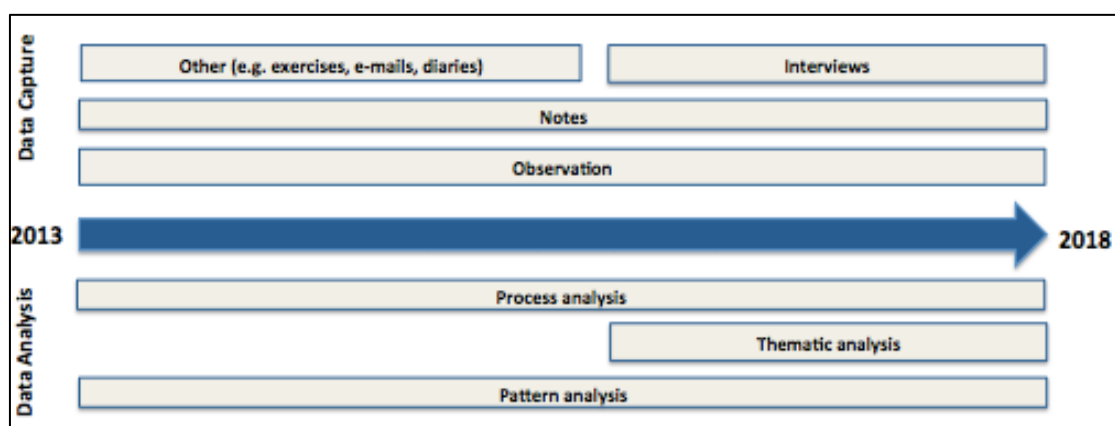
Figure 6-6 Forms of data capture and analysis over the course of the study (2013-2018)

6.2.2. Interviews

Interviews made up the core form of data-capture for the study. A variety of interview types were employed including structured, elicitation, in-depth and mini-interviews. In total four distinct phases representing 157 interviews, with 90 different respondents, took place between June 2017 and December 2018. Each of the four interview phases were guided by a specific purpose and intent.

[1] Tool *Design*: the first phase of interviews supported the development of a visualisation tool. These employed structured telephone interviews to provide initial data for the design of the working tool. The aim of this phase was also to explore the relevance of the temporal dimensions to the post-programme context of respondents. A detailed overview of the Tool Design interviews is contained in Period Four of the visualisation.

[2] Tool *Pilot*: a second set of interviews gathered feedback on the first version of a working tool. These interviews explored how respondents reacted to the tool (both face-to-face and on-line versions) and how they made sense, if at all, of the various visual dimensions. The details of the Tool Pilot interviews are contained in Period Five of the visualisation.

[3] Mini-interviews: a range of mini-interviews focused on the post-programme context of respondents. These explored the temporal experience of participants in the immediate wake of three *Impact* programs (October & November 2017, March 2018). This phase sought to understand what respondents actually did with their change commitments when they returned to the workplace (in the absence of the tool). It aimed to highlight the experience of the immediate temporal context and whether this experience was linked in any way to the commitment to practise. Details of the mini-interviews are contained in Period Six.

[4] The final set of interviews were known as the **'PPP'** (the Post-Programme Process). The aim of this phase was to use and evaluate the working tool in a real-world setting. The tool was employed over a 2-month period after an *Impact* learning programme in September 2018. This was also a key opportunity to explore four emerging temporal themes, the strands for which had emerged over the course of the previous interview phases.

The majority of interviews took place after a 'successful' *Impact* programme. The logic for this was to establish the best possible circumstances for 'transferring' change commitments to the workplace.

Figure 6-7 outlines the unfolding plan of the interviews. The boxes in green represent the interviews while the arrows above them represent the four interview phases. The interviews are placed within the wider context of other research activities over the course of the study (e.g. Research Agreement negotiation). Interviews took place at different times (see timeline at the bottom of the figure) and involved participants from specific 'runs' of the *Impact* programme (e.g. 'Oct', for October 2017 *Impact* programme).
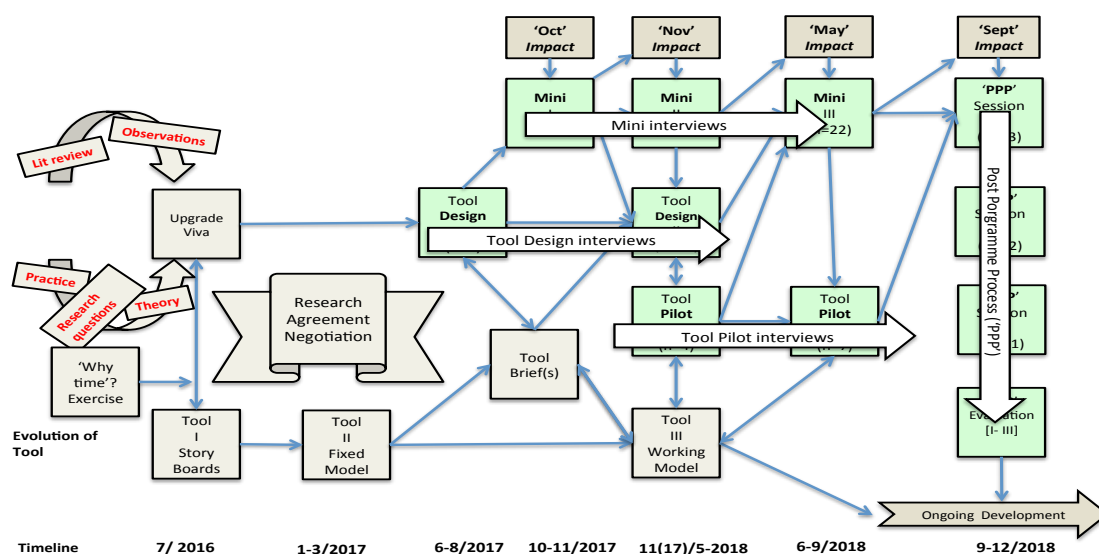
Figure 6-7 Locating the interview phases in the research process

6.2.3.   The interview plan…versus interview reality

At the Registration Viva in July 2017, the interview plan for this study appeared clear and straightforward. In the first instance, prospective users of the tool would take part in a comprehensive structured telephone interview (65 questions) that was quantitative in nature and based around five temporal dimensions. This 45-minute interview would focus exclusively on data collection and would be followed by two further sessions when the tool would be used (with the previously collected data) to facilitate the practising of learning commitments. It was assumed that the last two sessions would occur at the respondent's workplace and would be face-to-face. Finally, I was confident at this stage that I would design, construct and code the working tool myself. Almost <u>every</u> aspect of this plan would change over the course of the next 24 months.
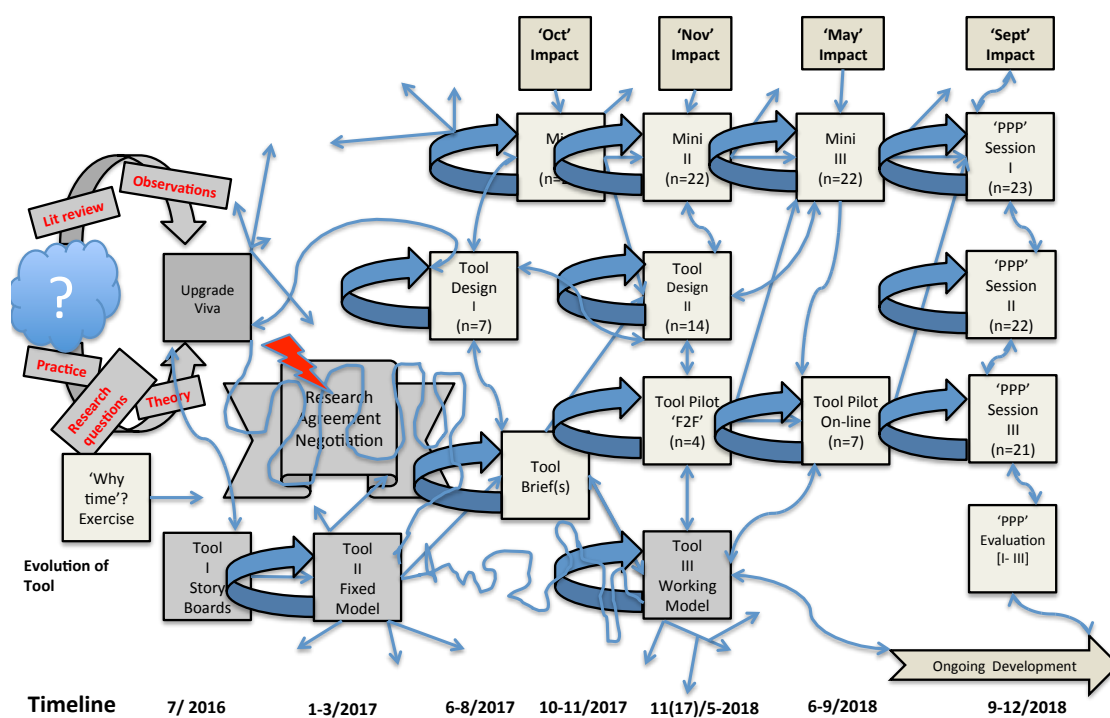
Figure 6-8 Reality of the interview process

Figure 6-8 provides a more realistic representation of the interview process. In effect every phase represented a mini process of re-cycling as new and different approaches to interviewing were employed. Getting this process done involved navigating a complex relational space where opportunities arose, hurdles appeared and plans were refined, changed and occasionally abandoned. The period between interviews was often bi-directional eating into time, energy and resources. In many cases these intervening periods shot off on tangents as I, or key stakeholders at Forum changed focus or direction. This frequently required a reframing of aspects of the study.

It is important to note that the cycling and recycling surrounding data capture meant there was not one overriding approach to interview design. As learning took place the interview process changed. This has had practical implications for the structure and presentation of the study. In particular I describe each set of interviews in detail and provide supporting documentation for this in the appendices. This is important in providing the logic, and level of understanding, associated with each phase of data capture but did mean that data capture needed to be revisited in the study on a number of occasions. This also had an analytical function. In line with a key requirement of Process Tracing analysis, detailed descriptions of the what, how and why of interviewing were important in providing the temporal signposts to the process of tracing (Collier, 2011). I will elaborate further on this in the Data Analysis section.

6.2.4.   **Observation**

Formal interviews were supplemented over the course of the study by observation. My longstanding relationship with Forum gave me the opportunity to observe the company and its employees at close quarters (Kawulich, 2005). Between my first engagement with the company in 2008 and the final use of the working tool in September 2018, I led 49 learning programmes at Forum, all located at their global headquarters. While some of the early programmes were bi-weekly in structure the majority were either 4 or 5 days long. This meant that I spent close to a year of my

life (355 days) at Forum's head office between 2008 and 2018. Each of these days represented a 24-hour experience; the head office was part of an interconnected city complex that included a dedicated company hotel where I stayed for each visit. Over the period I (literally) 'lived' at Forum and, for most of this time, had no need to leave the company premises – I slept within the complex, had breakfast at the restaurant, shopped at their convenience store, exercised in the company gym and had dinner in-house. The specific location of the programme remained the same throughout this period – a large meeting space on the first floor of the main headquarters building. The nature of my working arrangement meant that I was located in the midst of a working office environment where I could see at first-hand how employees engaged and interacted with one another. Furthermore, the nature of my access requirements allowed me to visit employees in any part of the complex at any time.

My close relationship with Forum gave me special access to the internal workings and dynamics of a complex global organisation. But this access came at a cost. My role as a mix of 'outsider' and 'insider' (Rabe, 2003) challenged what I could see as a researcher especially as Forum's 'way of doing' became normalised and natural to me. Increasingly this is where field notes were crucial. They acted as vehicles for reflection, giving me a disciplined opportunity to step back from the 'swamp' of my practice and build some reflective distance into my research process.

6.2.5. **Notes**

Notes were the means by which the process of observation came to life. I maintained extensive field notes over the course of the study – over 550 written artefacts, in various forms, were generated between 2013 and 2020. The majority of these were soft copy files (Microsoft word documents) maintained in named reflection folders on a secure computer. I also kept a dedicated physical journal for quick reflections and visuals ideas.

Note-taking is increasingly seen as an important ingredient in the doctoral process (Callary et al., 2012; Phelan, 2018; Schmidt, 2019). That said, there is no agreement as to how best to capture notes or what approach is most appropriate within a given research context (Jensen Fielding, 2018). For me 'field notes' (Pacheco-Vega, 2019) became the most authentic representation of the reality of the note-taking process.

Notes were used primarily to capture information 'in-flight' (Pettigrew, 1990) as well as to facilitate reflection (Maharaj, 2016) and reflexivity (Thompson, 2014). They provided both formal and informal data for the study (Mulhall, 2003) acting as a source of prompting, challenge and after-the-fact inspiration. Notes tended to be most helpful in making sense of complex unfolding situations and often gave solidity to the relational backstory of the research. Most of the notes captured had the key ingredients of a learning cycle (Dewey, 1910; Kolb & Fry, 1974; Lewin, 1946) but also acted as an outlet for my feelings and emotions at any point. Throughout, *Tales of the field* (Maanen, 1988) acted as a reliable resource and guide to my note-taking activities.

Ease of access and use was the defining logic for the format of notes. In the early years (2013) I experimented with notes based around a formal reflection approach (Maanen, 1988). This however felt laboured and artificial (Sanjek, 1990). Increasingly I found myself reluctant to use the notes and I missed key opportunities to capture information, develop thoughts and engage in reflection. I decided to replace this with a more informal and unstructured approach where I would capture *anything* that felt relevant in an immediate and timely fashion. Over time this process became central to my research – any key activity, experience or interaction was usually accompanied by a note; ultimately not doing so felt unnatural.

Different types of notes were maintained over the course of the study, these mostly relating to issues of my practice, stakeholders' engagements, the interview process, content suggestions, critical instances, doctoral considerations and personal

reflection. Annotated examples of two types of notes are included in Appendix F and Appendix L, as well as post-interview bullet-point notes in Appendix E.

Finally, the process of note-taking was inextricably linked to the interviews. While each phase of the interviews had a specific purpose, the *experience* of the interviews during the development of the tool was also crucially important. The different forms of interviews employed over this period (e.g. detailed telephone interview, quick mini-interview etc) acted as on-going pilots for how the tool's data capture would eventually take place. Reflections on the interview experience were captured by note-taking after each interview and incorporated into wider data capture and analysis.

6.2.6.   Additional forms of data capture

The study provided opportunities for a range of natural artefacts to be used in triangulating formal capture methods (e.g. electronic diary screen shots, e-mail communication, photos).   Short pilot exercises were also employed prior to Registration to test the initial 'hunch' surrounding the role of time in practising learning commitments. A description of this exercise is included in Period 1 of the visualisation.

6.3.   Section 3: Data Analysis

As outlined in Chapter Five, the study sought understanding and use both 'in-the-event' and 'after the fact'. As a consequence, it required a form of analysis that operated simultaneously in, and over time. Process Tracing provided this framework (Hall, 2013; Ricks & Liu, 2018).

6.3.1. **Process Tracing**

Process Tracing is built around two key features (Collier, 2011). The first is a requirement to build rich, 'static' descriptions of an event or situation at a particular point <u>in</u> time (Mahoney, 125-31). The second feature involves developing an unfolding understanding of these static descriptions <u>over</u> time. This, as described in Chapter Five, co-mingles stasis and sequence to make visible the emergence of change over time.

Static and sequential analysis were interlinked over the course of the study. As static analysis occurred, a picture emerged of the level of understanding at that point in time (e.g. what did I understand about interruptions during the first semi-structured interviews compared to what I understood during the final interview stage – the PPP). These on-going levels of understanding were linked through the recycling of moments of learning into the next stage of the study (e.g. a new understanding about a dimension or a process would lead to a potential change in the process and hopefully lead to increased understanding and better use). In my mind I came to understand the activity of *Tracing* as the cumulative process of <u>vertical</u> and <u>horizontal</u> analysis. Vertical analysis involved levels of thematic analysis at a point in time while horizontal analysis captured the growth of understanding and use over time – something that was possible as a consequence of the static analysis.

The combination of vertical and horizontal Tracing was made up of four stages. These are displayed in Figure 6-9. Moving from left to right the diamond shape implies the increasing depth of (vertical) thematic analysis over time. This is then synthesised into a coherent, cumulative narrative by the horizontal processes which ultimately informed design choices via Pattern analysis. These four stages are outlined in greater detail below.

[1] The first stage of Tracing analysis involved building rich descriptions of the two central themes ('Time' and 'Tool') at particular points in time. This was achieved via

the use of Thematic analysis (Attride-Stirling, 2016; Castleberry & Nolen, 2018), broadly following the model employed by Attride-Sterling. The themes of 'Time' and 'Tool" were explored for two purposes – for 'use' as the tool was being developed ('prehension') and for 'understanding' after the fact ('developmental'). To facilitate both understanding and use, two levels of Thematic analysis were employed during and after the interviews.

The initial level of Thematic analysis took place 'in the flow' at the end of each interview. Once an interview was finished, key themes and reflections were captured in note form. These notes usually related to the content of the interviews (e.g. temporal dimensions), the interview process (what worked, did not work) or any observations, feelings or reflections relating to content and process. While the interview session was still fresh in the mind, interviews were transcribed highlighting key themes and outlining an initial thematic network. Reflections and themes from the note-taking were then added to the transcript in the form of bullet points at the top of the page. This analysis usually resulted in specific points of learning that involved some form of change to the interview content or process, tool development or the underlying *Impact* Programme.

It is important to note that the process of data capture (e.g. the experience of doing the interview) was also included in Thematic analysis. It was recognised early in the interviews that the mode of data capture (e.g. how the interviews took place) touched on issues of crucial ontological significance for the use of the tool, and needed to be incorporated into the data capture process.

[2] This second level of Thematic analysis took place after the interviews had been completed (e.g. between January 2019 and July 2020). This analysis was primarily deductive in nature and built around the five temporal dimensions. As the interviews progressed, new, more refined themes emerged and were developed inductively. The balance between inductive and deductive analysis changed over the course of the interviews. The analysis in the final phase of the interviews (the PPP) was inductive in

nature and built around four emerging temporal themes. I will describe these in greater detail in Chapter Seven.

[3] It would be unfair to say that the processes of horizontal Tracing involved a defined number of stages over the course of the study. This was not the case. In reality these processes were on-going right to the end of the research. Horizontal Tracing required the constant revisiting of the data in order to specify what (exactly) I understood and when (exactly) I understood it. This allowed for the inferential sequence of change to become visible as the study unfolded.

Logistically the combination of vertical and horizontal analysis had two very practical implications. It meant that each stage of analysis involved the analysis of all the data at that stage - only by doing this could I see what I understood at that stage and what was a new level of understanding. This had implications for the presentation of findings since choices had to be made as to what to include and what to exclude. As an example, some of the themes in the final PPP interviews were similar to themes in the first Tool Design interviews as new respondents were (legitimately) expressing their experiences for the first time. For me however, only some of these responses were relevant as the process of understanding about the phenomenon in question had moved on. This led to the continued revisiting of the account to illuminate, as well as illustrate (to the reader), where inflection points of understanding and use occurred. This was also important in avoiding unnecessary repetition in the account.
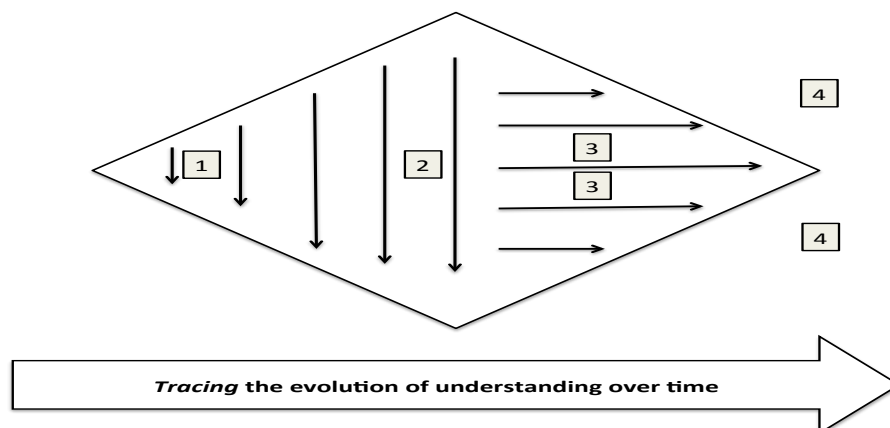
Figure 6-9 Four stages of Process tracing employed in the study

The processes of tracing also had implications for the simultaneity of understanding and use. As the tool was being developed I employed the level of understanding at a point in time to inform that development e.g. via feedback to the tool designer. There was an issue here. My level of understanding of a particular tool feature might change as the study progressed, however the decision concerning use was often frozen at a moment in time, in the physical design of the tool. This meant that there could be a dislocation between the levels of understanding employed for use and (broader) sense-making after-the-fact. This had significant implications for the study, something I will return to in the final chapter.

[4] Finally, as levels of understanding developed over the course of the study they informed the design (and sense-making) of the tool through the use of the *Patterns* framework. As an example, a moment of crisis for the virtual tool in Period 5 forced me to reflect on the essential, basic operational features of a working tool. Use of the *Patterns* brought clarity to the core trade-offs necessary in those moments allowing the research to proceed. This issue is addressed further in the Tool Pilot interviews in Period 5.

In the discussion section of each Interview phase the status of data analysis at that moment of the study is represented in the form of a thematic map. While these maps are similar to those employed in standard mapping analysis, they have been refined to reflect the challenges associated with real-world investigation.

The link between linearity and time is deeply embedded in visual representation (Langley et al., 2013). Diagrammatic forms usually represent relationships as boxes and arrows, most often presented with clean, straight lines and clear un-encumbered directional flow (Ding & Meng, 2014; Nowell et al., 2017). This, as we have seen, would appear to be at odds with the experience of everyday practice situations where the messiness of the 'swamp' holds sway. Literally, and visually, this *produced* a problem for me - portraying this context as linear arguably reproduced, and reinforced an understanding of reality in a particular way. This raised a thorny

question. To what extent was the (linear) act of visual portrayal a simultaneous act of (non-linear) visual betrayal? It was an issue I faced repeatedly throughout the study. How could I make sure that the essence of my findings, many of them non-linear in nature, were not reified, or even nullified by linear portrayal? A number of recent contributions have sought to challenge the link between linearity, representation and time (Gehman et al., 2013; Lok & de Rond, 2012). I have sought to address the issue by 'playing' with aspects of diagram use throughout this study. Specifically, I have used curves, colours and shapes to capture the non-linear nature of thematic representation. As I have done this I have endeavoured to highlight the intended meaning of such usage (e.g. why use a colour in a representation?) so as to guide the reader.

6.3.2.   **The nature of transcription**

Transcription was performed personally in Microsoft word documents. The priority associated with producing transcriptions soon after interviews meant that transcripts had to be revisited and 'cleaned-up' after the event. This often entailed redacting and removing certain elements that contained references to Forum or their businesses. At the same time any sections involving informal chat and conversation also had to be removed e.g. conversations were usually interwoven with references to topics, themes and individuals of a sensitive and confidential nature. Redaction and removal of sections of the text were also necessary to comply with the provisions of the Research Agreement with Forum. This meant that many transcriptions were not captured fully verbatim as it was necessary to remove or change segments of text that lead into, or out of a redacted/removed passage. While the removal of text can have an impact on the understanding and flow of the transcriptions, every effort was made to respect and preserve the underlying meaning. Where an aspect of meaning in the transcription text was judged to be challenged, a side-note was written explaining the context to the change. I have included an example of a transcribed interview in Appendix E.

6.3.3.   **The challenges of data management**

Interview data was maintained and managed using both Microsoft excel and word files on a secure, air-gapped computer. The decision not to use a data analysis software package was based on access and documentation issues at Forum as well as broader ontological considerations.

The use of a cloud-based analysis software package (NVivo) was vigorously opposed by Forum. The issue of data management and storage became a point of contention during the negotiation of the Research Agreement. Forum representatives became increasingly exercised by the thought of employee 'data' (however well protected or anonymous) being hosted outside the company. The issue of remote, stand-alone storage on an established package was also problematic as the data might be open to external hacking or internal (e.g. an academic colleague's) abuse. It was eventually agreed that (soft) data needed to be maintained in a form that did not attract targeted external attention (e.g. Excel files as opposed to specific package) and had to be managed on an air-gapped computer.

There was also a wider ontological tension exposed by the use of a software package. I employed NVivo to manage my data during the first round of mini-interviews. While technically I experienced no issues, there seemed to be something about the nature of the process that did not fit with the use-orientation of my study. I found that the data I was generating from the interviews became somehow remote and abstract as it was managed in the package and I found it difficult to stay connected with, and actively facilitate, the parallel in-action insight. I decided to abandon the process at the end of the first round of mini-interviews, and agree to Forum's request for the secure remote storage and management of data. I chose instead to build my own model (Excel-based) for managing data (see Appendix M).

I have reflected on the above decision many times. Reviewing my notes made at the time, I have wondered whether I could have done anything differently. Should I have

pushed harder on this? Did I use the so-called ontological rationale as a way of justifying my decision? With hindsight it is interesting to note how the temporal context at the time of negotiation was tied up with the decision. Historically, Forum has been a very risk averse organisation and this issue, in their eyes, sat firmly within this category. It was also a decision made when public awareness and consciousness surrounding external computer hacking had become particularly heightened (Rusbridger, 2011; The Irish Times, 2011; The New York Times, 2014; Wong, 2017). Forum had recently experienced a number of such 'attacks' and this was a key concern (however well grounded) for the negotiator of the research documentation. For me this episode exposed the subtlety and complexity of issues that rarely get mentioned in textbooks yet are very real (and constantly emerging) for the practice-based researcher.

6.4. Section 4: Evolution of the temporal tool (2013 -2018)

6.4.1. Constructing the tool

A working tool was the final stage in a process of design that took over five years to develop. During this period my thoughts about what a tool might look like evolved considerably. Two elements remained relatively consistent however, the use of visualization in some form and the role of time. To do justice to these elements, in their own medium, I have outlined the *visual* story of the *evolving* tool in the following section.

As I have noted, I initially believed that I would design and code the working tool. In the months that followed the Registration Viva it became clear that this route was (a) too time consuming and (b) beyond my technical competence, in particular to produce a tool that would appear professional and credible. Through the introduction of Professor Blackwell, I commissioned a Cambridge post-graduate student ('the designer') to assist in programming a working prototype of the tool. The student was paid £2000 in total for this commission. It is important to note that the designer

provided technical capability to the study in constructing the tool. <u>All</u> conceptual and creative aspects remained solely within my control and consideration thereby maintaining the integrity of this submission.

I met with the designer on eight occasions over 2017-18 in order to scope out the requirements for the project. As part of the design process, I produced a series of detailed briefs containing step-by-step information on the structure, 'look and feel' and the core interactive features of the tool. These briefs were supported by a series of hand-drawn diagrams covering all aspects of the tool's visual representation. The detailed briefs are included in Appendix N.

Reflections and observations from the design meetings were captured after each session. These notes covered learning about technical aspects of the design as well as the nature of my interaction with the designer. Finally, issues relating to intellectual property (IP) of the design were covered through a signed Non-Disclosure Agreement (NDA) with the designer. This NDA was a requirement of the Master Research Agreement signed with Forum. To ensure that the designer's interests were protected under this agreement, Professor Blackwell reviewed the NDA before signing.

6.4.2.   Some considerations when reading this document

The following section displays how the visual representation of the tool evolved from the initial crude thoughts at inception to the final working tool. The duration of the study (2013-2018) is broken down into 6 separate periods, each distinguished by the nature of a physical artefact that existed at that moment, and the duration of the periodization.

To provide the reader with background, each period is prefaced by a short narrative describing the context to the period. This is followed by images and visuals that were relevant to the tool at that stage of its evolution. In order to aid the reader, the

particular period is located within a diagram of the overall research process and key visuals are linked to the short narrative at the start.

Periods three, four and five are each supplemented by additional narrative. This is to explore the challenges related to research documentation in Period Three and the formal process of data capture and analysis that supported Tool Design and Piloting in Periods Four and Five. Each of these narrative sections includes a discussion section.

Moving from one period to the next represented an analytical shift in the visual design (e.g. the visual Activities and Experiences), as highlighted by the *Patterns* changing. The basis for the analytical shift is briefly outlined in the narrative at the start of the period and highlighted in the images by means of comparison between the Excel sheet for that period and the period preceding. The transition is recognised by means of a yellow arrow.

For ease of reference each of the Activities and Experiences on the Excel sheet are given a descriptor code (e.g. A1 (Interpretation Activity) or TE5 (experience of thinking) with the activities and experiences referred to by these codes in the associated narrative. **NOTE**: given the limitations of the medium it may be useful for the reader to expand the magnification of the Excel sheets to see the individual criteria that are highlighted (pre-COVID it had been hoped to provide these visuals in enlarged physical form). These codes are also outlined in Appendix P.

Period 6 represents something of a postscript to the document. This involved the use and evaluation of the tool and is covered in detail in Paper III. Included in this period however are a series of mini interviews that sought to capture the immediate temporal experience of the post-programme context. The output from these interviews generated an 'activity' curve that sought to highlight the change in practising satisfaction over time without the use of the tool.

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6.4.3. **Period 1** **'Exploration'** **(2013 – June 2016)**

This first period was defined by attempts to think creatively about how the practising of post-programme learning commitments might be supported. As noted at the end of Paper I, traditional approaches to support at Forum (e.g. coaching and mentoring) had a strong individualistic focus. My first thoughts about a tool had a similar emphasis as I considered some form of mobile app. Increasingly however I became convinced of the need to 'decentre' the individual and explicitly address contextual 'blockages' to practising **[see Figure 6-11].**

Given my hunch that 'time', in all its richness, was linked somehow to practising I conducted a series of exercises with members of the learning community at Forum. These exercises provided the first credible data that appeared to support my hunch **[see Figure 6-12]**. Giving some form of visual expression to a multidimensional conception of time also looked promising. Employing visuals was different to anything in use and had growing theoretical foundations. It was at this stage that I approached Professor Alan Blackwell at the University of Cambridge Computer Lab who had a speciality and expertise in visualisation. In our first meeting I needed to introduce my topic to him in an understandable fashion so I used Dali's 'melting clocks' to capture the visual and conceptual potential of 'time' **[see Figure 6-13]**.
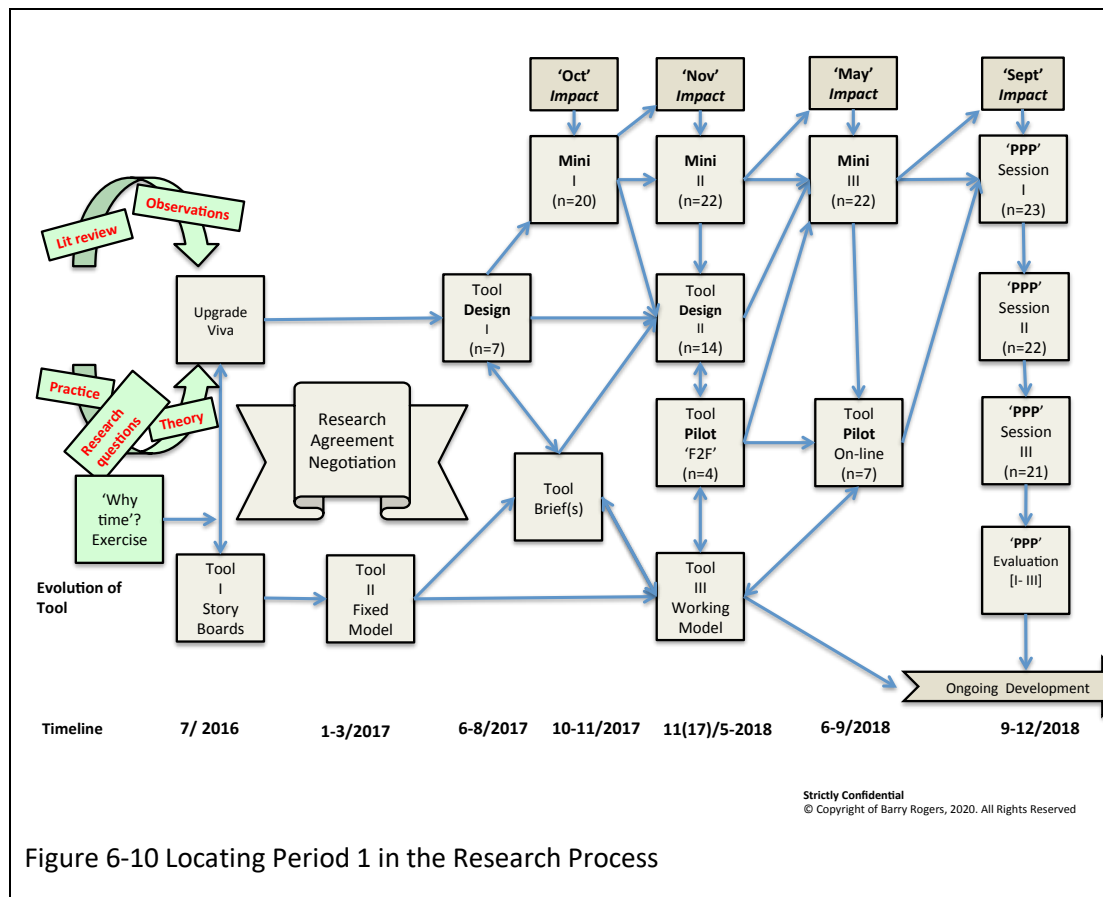
Figure 6-10 Locating Period 1 in the Research Process
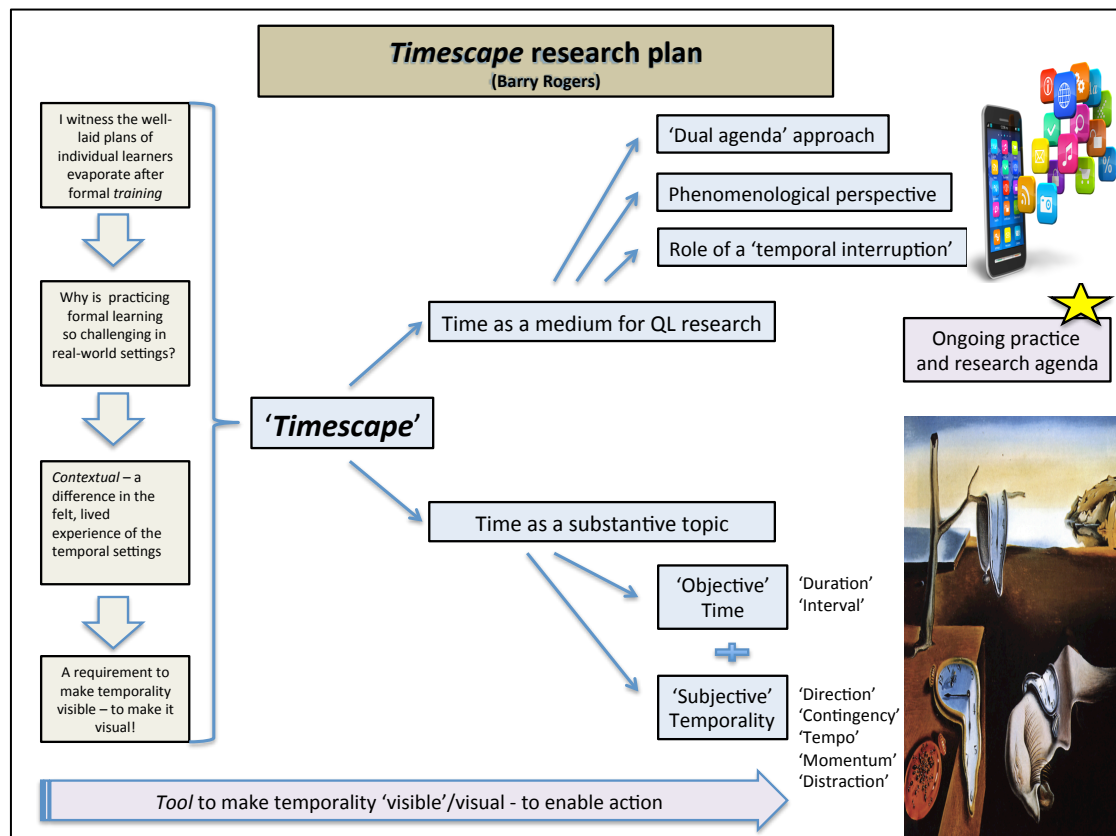
Figure 6-11 Research plan from 2015 showing the development of an App (top right)
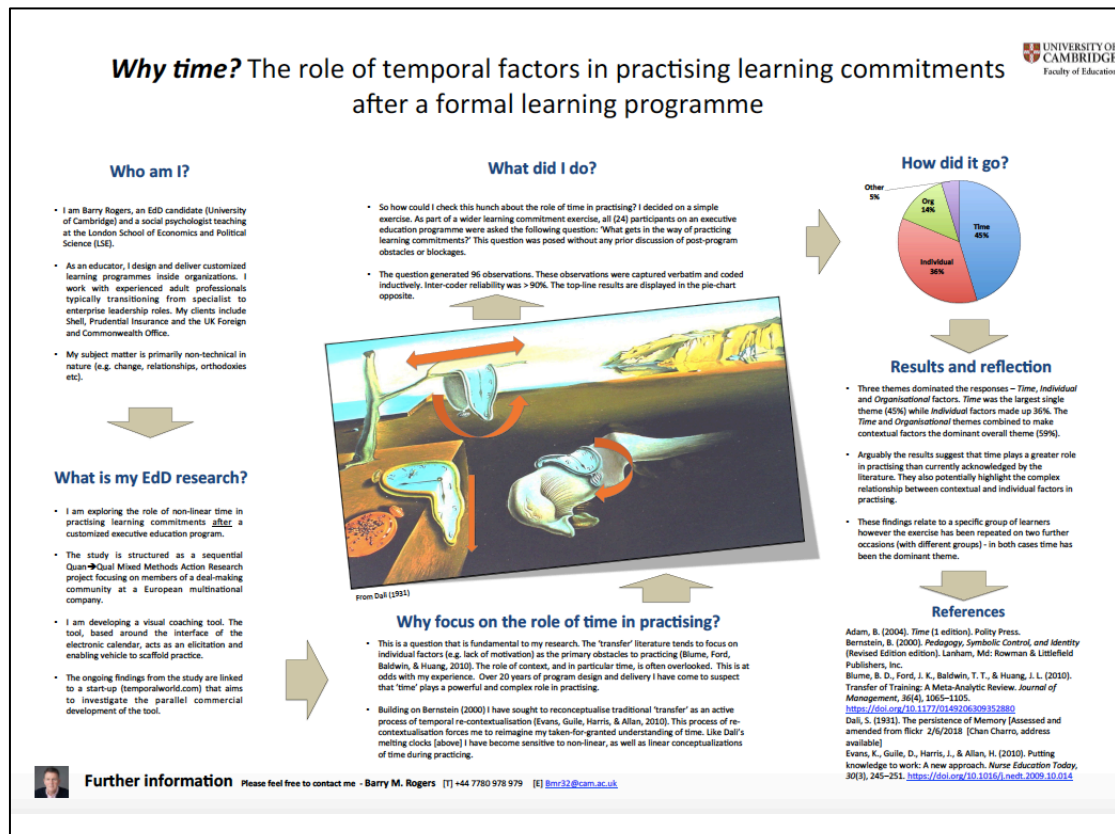
Figure 6-12 Poster for EdD conference outlining results of 'box' exercise on time
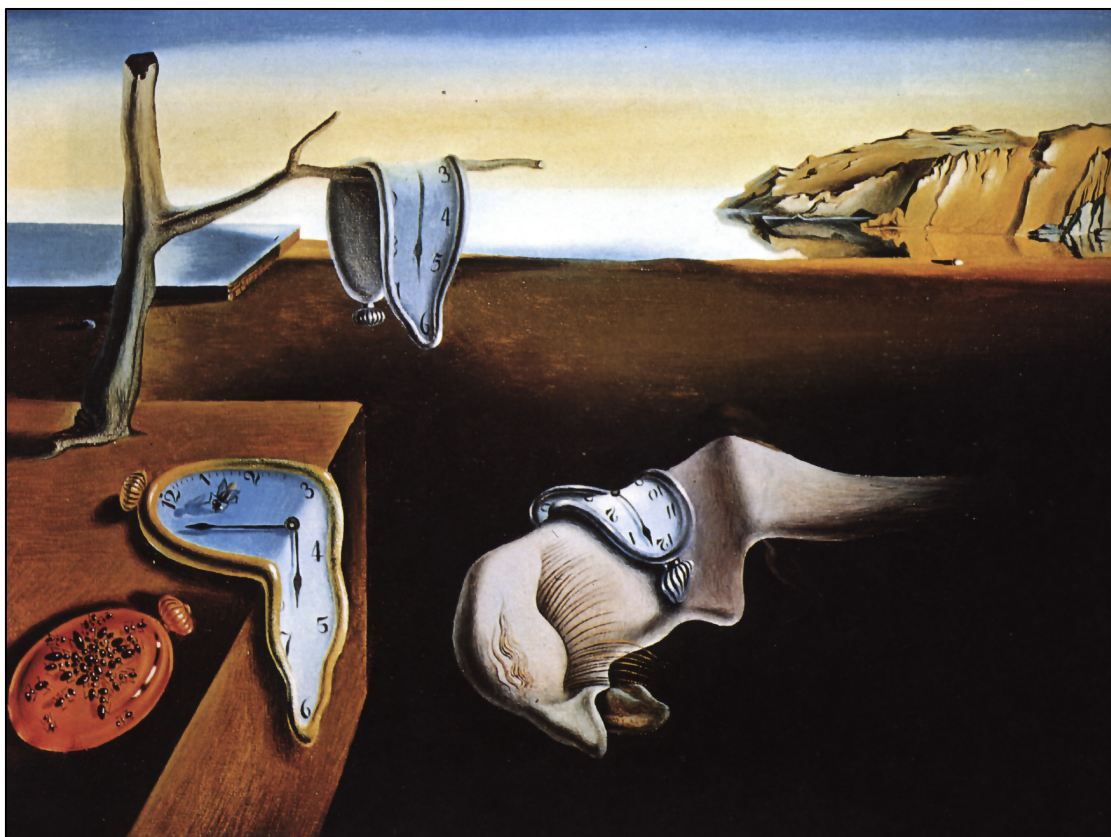
Figure 6-13   Dali's melting clocks used in presentation to Professor Alan Blackwell (Source: copyright free)

Period 1:									
PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams					PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)				
[1] Interpretation activities: reading Information Structures					[1] Experiences of visibility			[4] Experiences of interaction	
This group of patterns describes the activities of diagram readers					VE1	The information you need if visible		IE1	Interation opportunities are evident
IA1	Search	VE1, VE4, SE3, TE4			VE2	The overall story is clear		IE2	Actions are fluid, not awkard
IA2	Comparison	VE5, SE4, ME4, TE2			VE3	Important parts draw your attention		IE3	Things stay where you put them
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5			VE4	The visual layout is concise		IE4	Accidental mistakes are unlikely
					VE5	You can see detail in context		IE5	Easier actions steer what you do
								IE6	It is easy to refer to specific parts
[2]Construction activities: building information structure					[2] Experiences of structure			[5] Experiences of thinking	
This group of patterns describes the different ways of manipulating diagrams					SE1	You can see relationships between parts		TE1	You don't need to think too hard
CA1	Incrementation	IE1, PE6			SE2	You can change your mind easily		TE2	You can read-off new information
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5			SE3	There are routes from a thing you know to something you don't		TE3	It makes you stop and think
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1			SE4	You can compare and contract different parts		TE4	Elements mean only one thing
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4						TE5	You are drawn in to play around
[3] Social activities: sharing information structure					[3] Experiences of meaning			[6] Experiences of process	
This group of patterns describes the activities of people who use diagrams in collaboraive contexts					ME1	It looks like it describes		PE1	The order of tasks is natural
SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3			ME2	The purpose of each part is clear		PE2	The steps you take match your goals
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4			ME3	Similar things look similar		PE3	You can try out a partial product
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5			ME4	You can tell the difference between things		PE4	You can be non-committal
					ME5	You can add comments		PE5	Repitition can be automated
					ME6	The visual connotations are appropriate		PE6	The content can be preserved
								[7] Experience of creativity	
								CE1	You can extend the language
								CE2	You can redefine how it is interpreted
								CE3	You can see different things when you look back
								CE4	Anything not forbidden is allowed

Figure 6-14 Classification of Patterns in Period 1

6.4.4.   **Period 2   'Sense-making' (July 2016)**

The six months preceding my Registration Viva was significant in setting the foundations for a visualization approach to tool design. As I explored various dimensions of time, this period saw the first attempts at representing linear <u>and</u> non-linear time in visual form. The ultimate representation of this visualisation took the form of 6 physical storyboards, each presenting a different temporal dimension within a generic electronic diary backdrop. The boards were submitted alongside my EdD Viva Registration document **[see Figure 16-21]**.

The visual story-boards appeared to be a powerful tool during the Viva. They gave expression to concepts that would normally be difficult to communicate and seemed to act as 'sense-giving' tools for my examiners. The approach informed a poster for the Cambridge EdD Conference 2017 **[see Figure 22]**, and a joint authored book chapter on non-traditional approaches to formative evaluation (Burnard et al., 2018). During the Registration Viva the *Patterns* highlighted how the storyboard diagrams operated primarily as sense-making vehicles [IA3]. The users of the tool during this period were mostly linked to the EdD (e.g. my supervisor, examiner, advisor). They needed to gain an appreciation of the connection between time, visualisation and the potential working of a tool in my research. This highlighted the role of social activities (e.g storyboards) in illustrating a story [SA1], how these boards organised a critical discussion around that story [SA2] and how eventually this story played a part in persuading an audience that this might be a viable approach [SA3]. **(see Figure 6-23 and 6-24)**
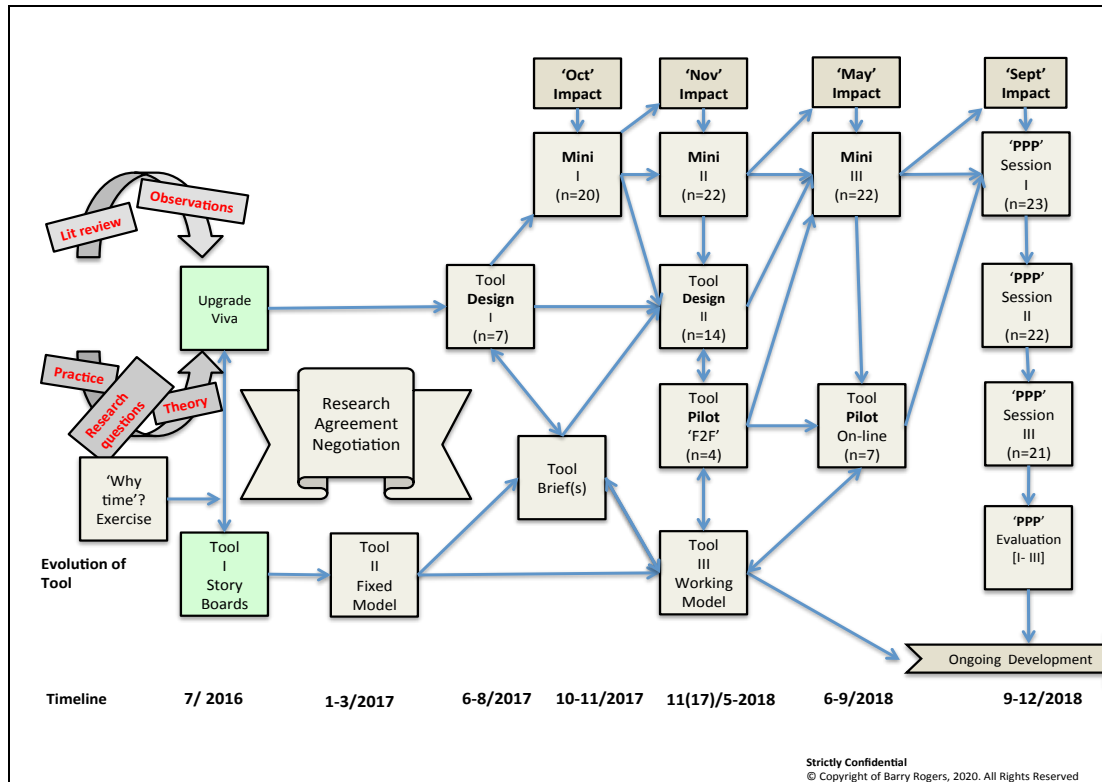
Figure 6-15 Locating Period 2 in the research process
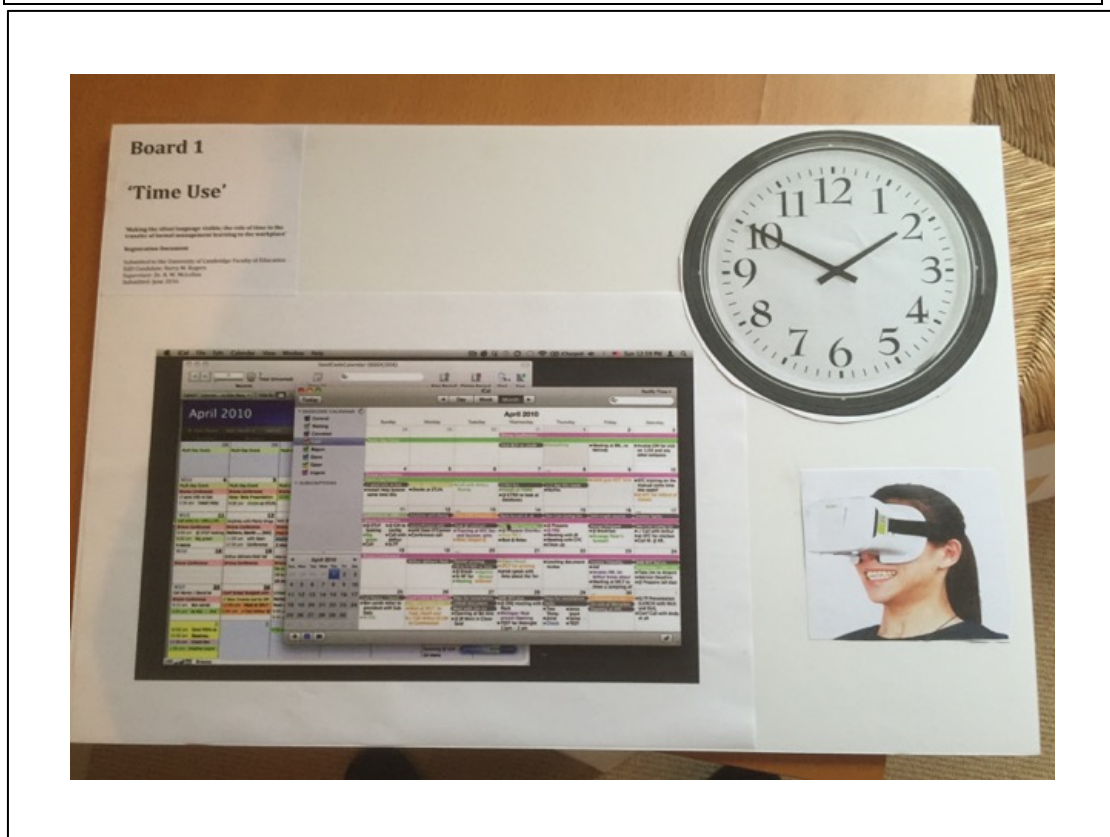
Figure 6-16 Story board from Registration – 'Time use' (e.g. linear time)
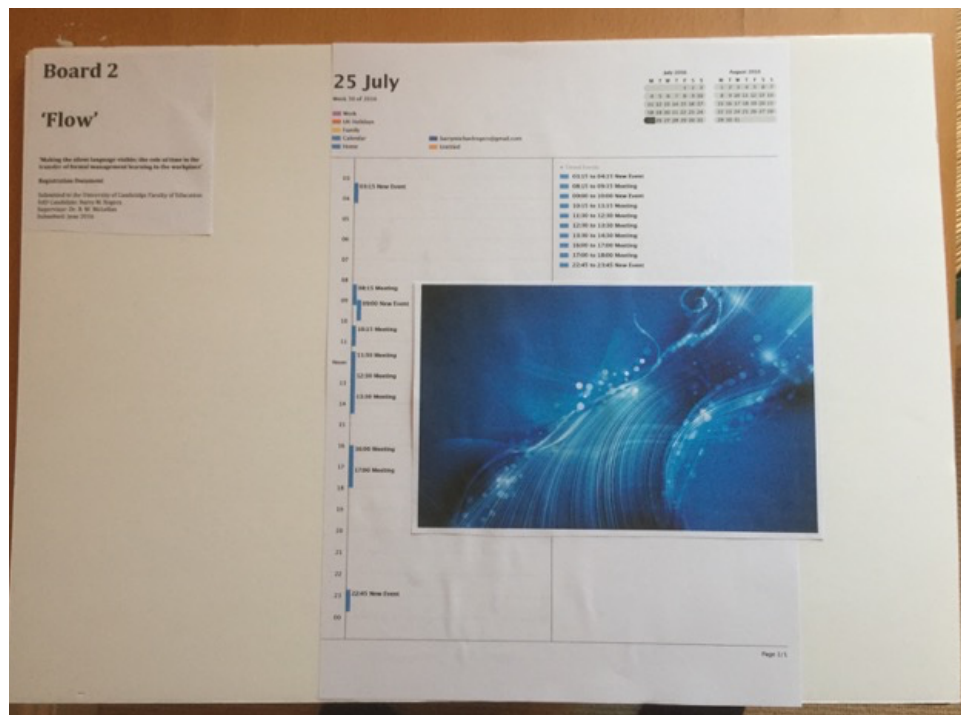
Figure 6-17 Story board from Registration – 'Flow'
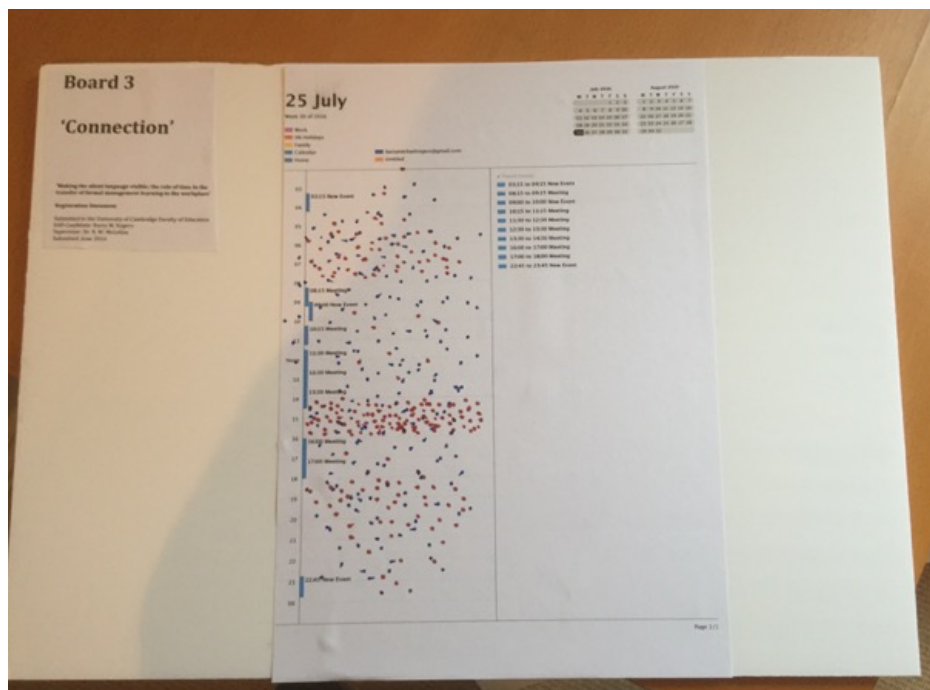
Figure 6-18 Story board from Registration – 'Connections' and 'interruptions'
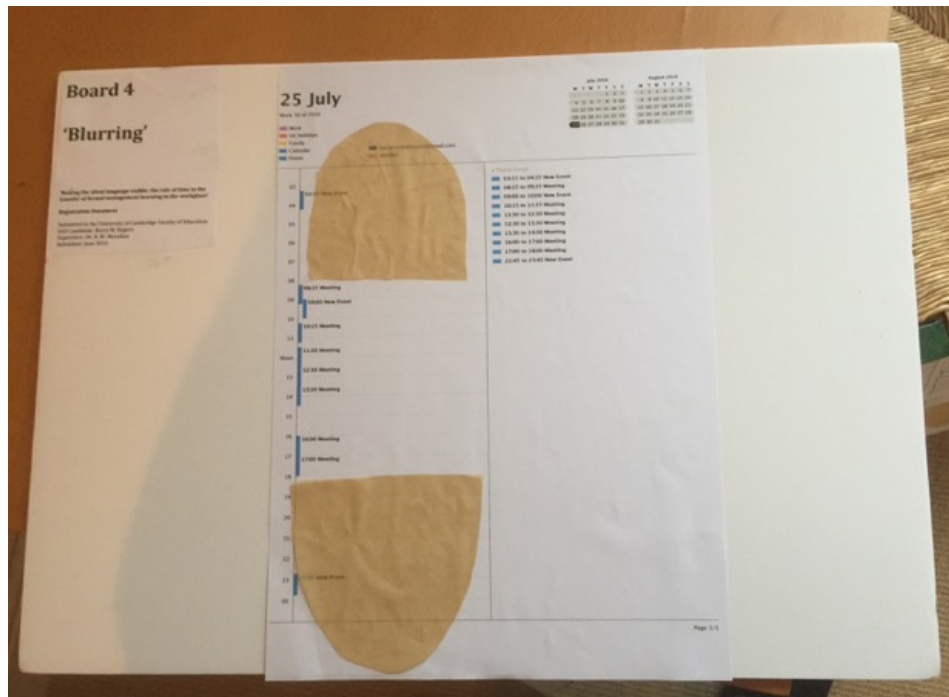
Figure 6-19 Story board from Registration – 'Blurring' between private and public time
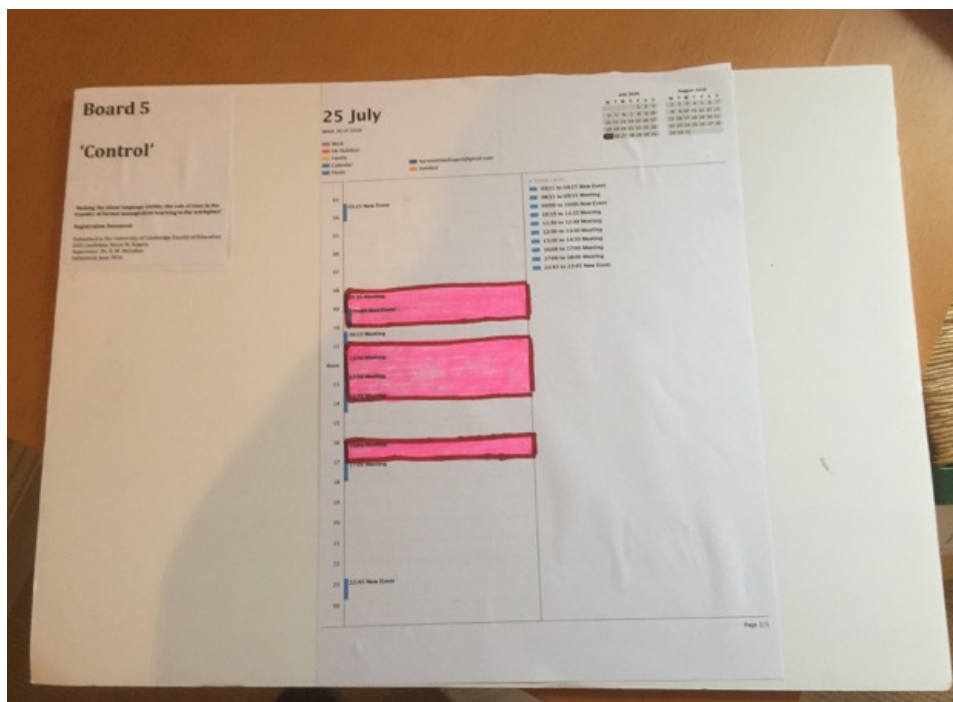
Figure 6-20 Story board from Registration – 'Control' (e.g. blocked off time in the diary)

Figure 6-21 Story board from Registration – 'Visibility' (e.g. the 'fog' of temporal uncertainty)

Figure 6-22 Poster for EdD conference outlining the use of storyboards

Period 1:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams
PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaboraive contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-23 Classification of Patterns in Period 1

Period 2:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams
PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaborative contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-24 Transition to classification of Patterns in Period 2

6.4.5.   Period 3   'Credibility' (August 2016 – March 2017)

After the Registration Viva, I sought to reproduce the storyboards in a professional format. This was driven by the need to display to Forum what a 'temporal' tool might look like in practice. My repeated references to 'non-linear time' were confusing to many who I worked with at Forum and this confusion prompted diverse, and multiple interpretations of the study. Simultaneously the protracted negotiation concerning the research documentation required a way of maintaining momentum and interest in my research. **(See Figure 25)**

At the introduction of Professor Blackwell, I commissioned a computer science student (based in Geneva) to build a non-working model based around the storyboards **[See Figure 26-32]**. Over a series of meetings in 2016/17 I worked with the student to produce an on-line presentation 'tool' that displayed the key elements of the storyboards. This model was employed over the coming months at a range of meetings at Forum to illustrate the potential for a credible (working) tool.

The emphasis during Period 3 now shifted to external stakeholders at Forum who would potentially support and sponsor the research process. To underpin the credibility of a visualization approach, experiences of thinking, meaning and structure appeared to become more salient within the *Patterns* at this time. In seeking to build trust with potential users, it was important that the visuals had credibility, that they looked like what they described [ME1], and that the various visual connotations were familiar and appropriate [ME6]. Given the playful nature of the tool there also needed to be a route to unfamiliarity [SE3], in a way that made the (tool) reader 'stop and think' [TE4] but without excessive cognitive effort [TE1]. **(See Figure 33 to 34).**
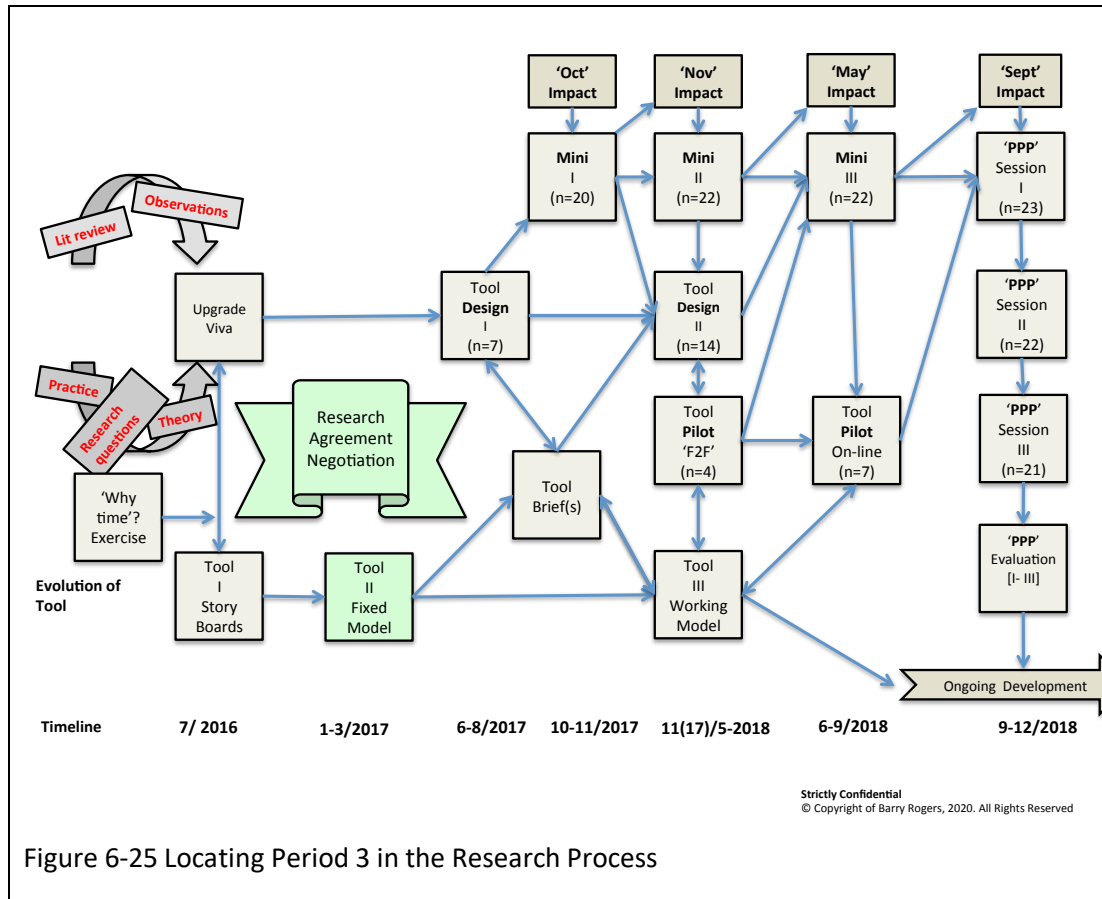
Figure 6-25 Locating Period 3 in the Research Process
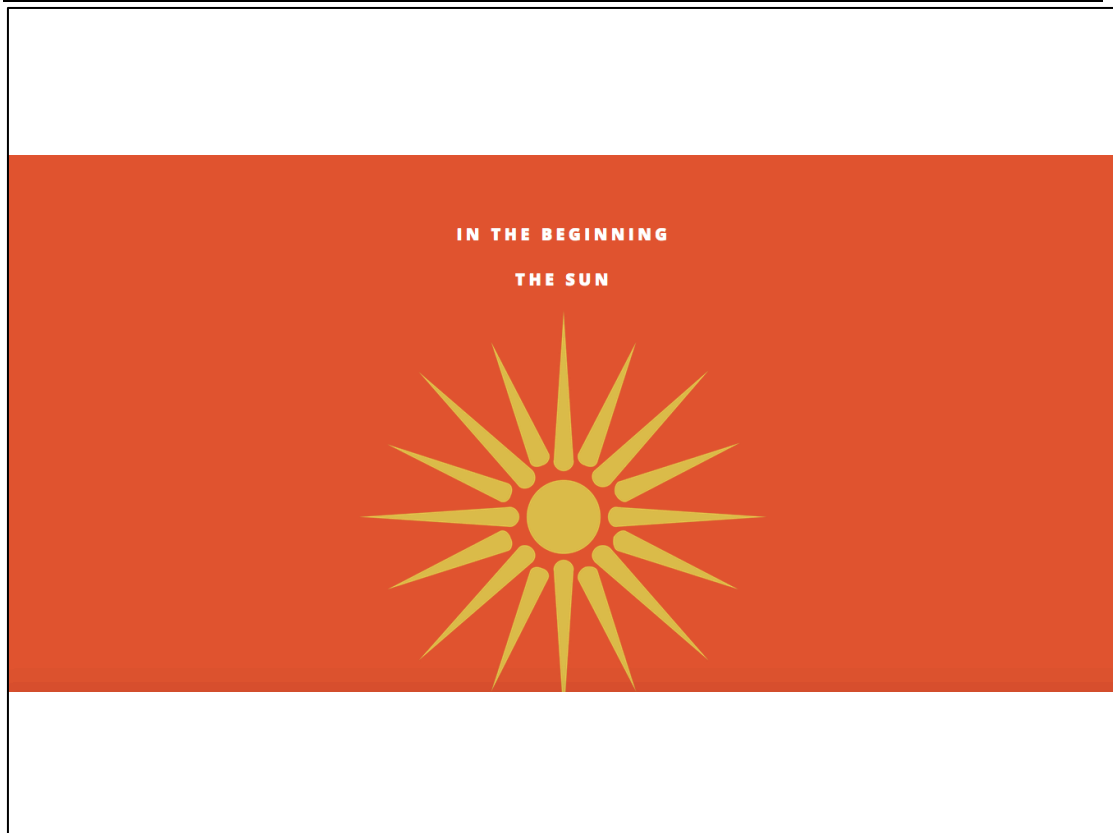
Figure 6-26 Tool presentation: origins of 'fluid' time
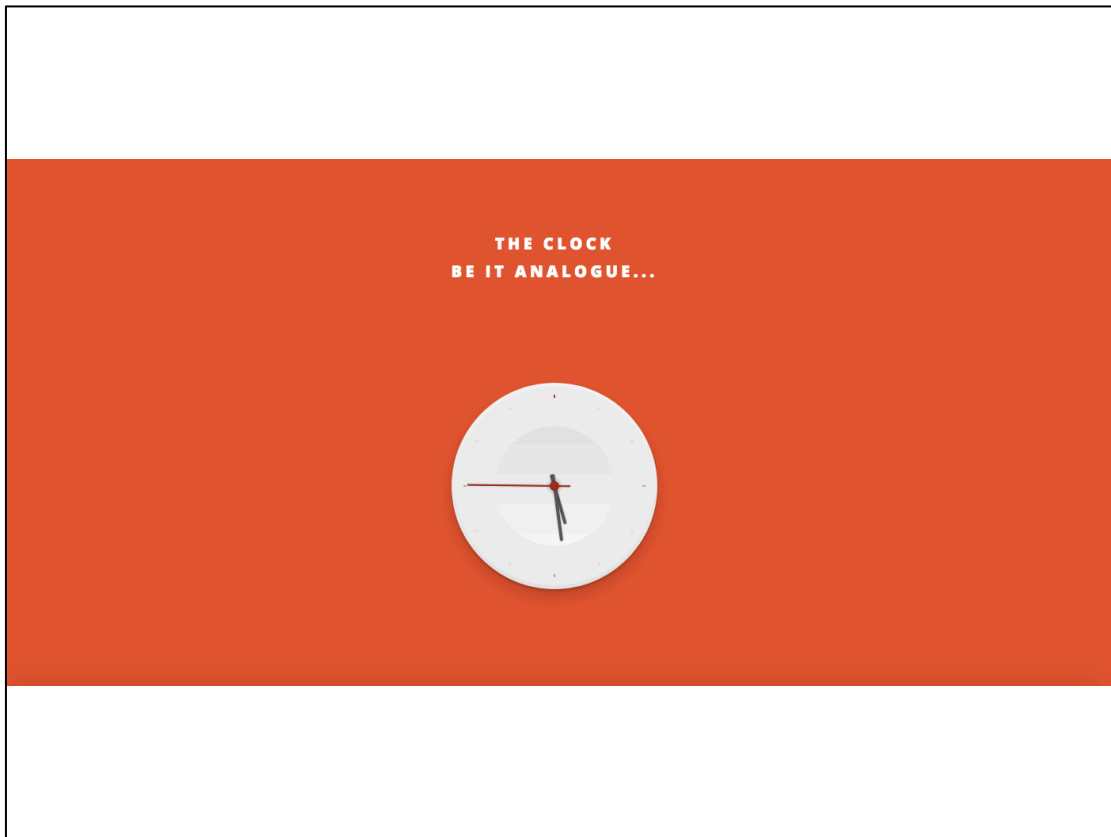
Figure 6-27 Tool presentation: arrival and representation of 'clock' time
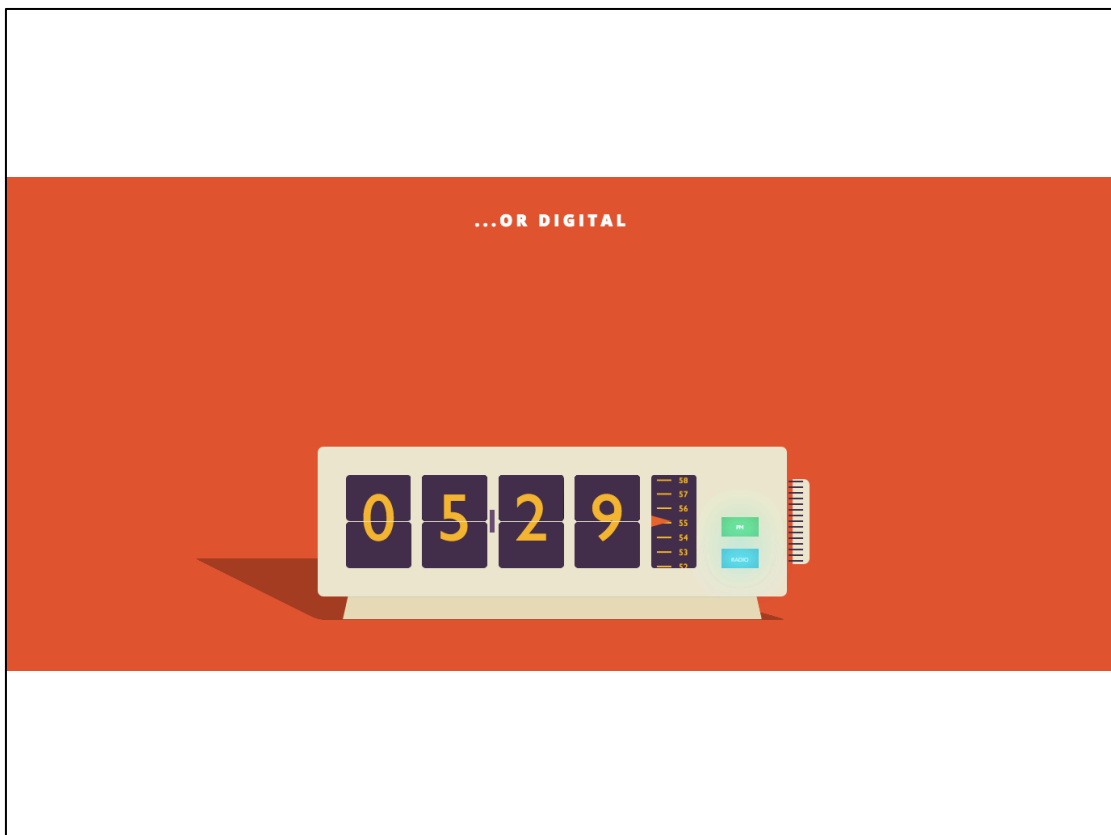
Figure 6-28 Tool presentation: representation of digital time

TIMES
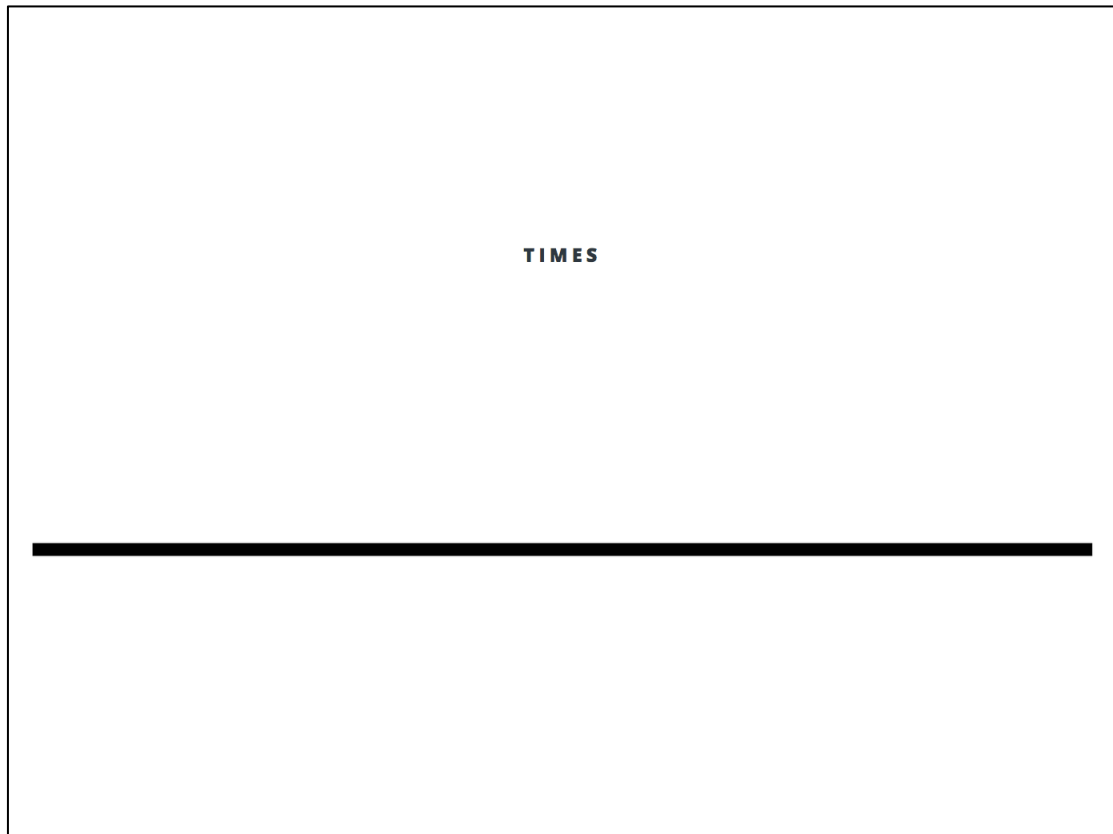
Figure 6-29 Tool presentation: linear time

THE CALENDAR

TIMES
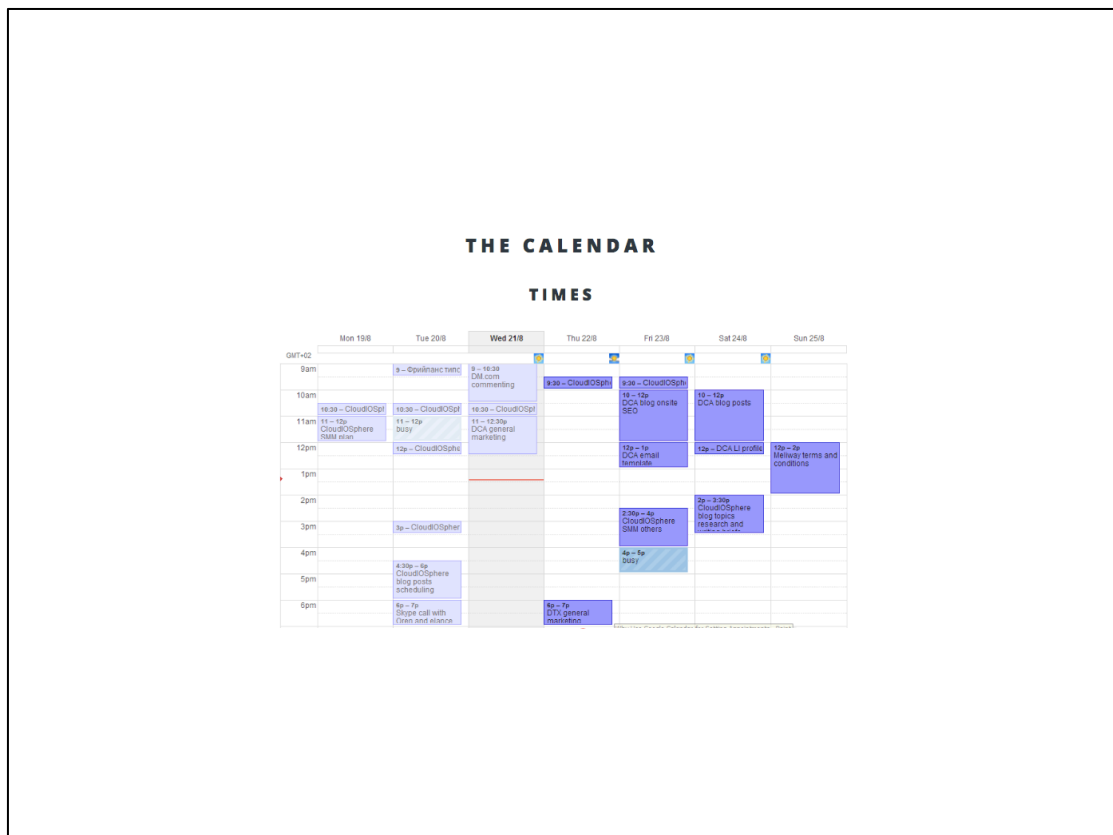
Figure 6-30 Tool presentation: linear time represented by the e-diary
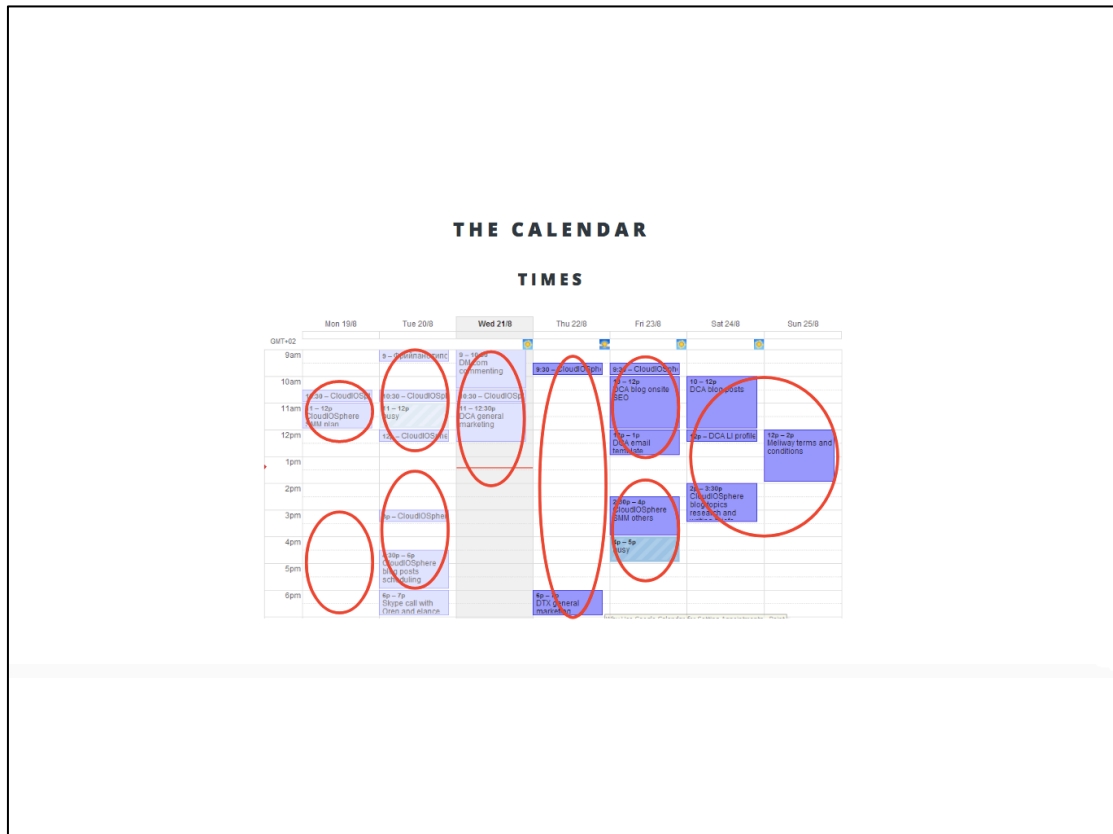
Figure 6-31 Tool presentation: flow of back-to-back meetings
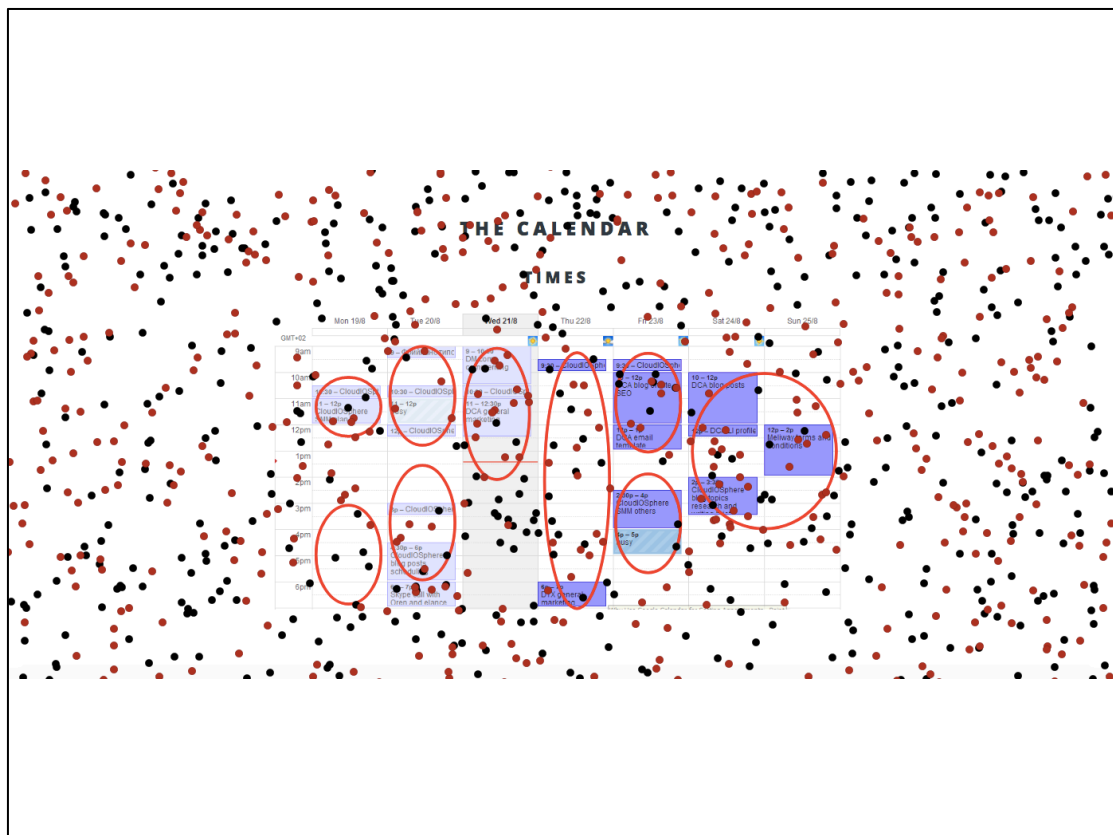
Figure 6-32 Tool presentation: time as interruptions and connections

Period 2:

	PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams		PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)				
[1] Interpretation activities: reading Information Structures			**[1] Experiences of visibility**			**[4] Experiences of interaction**	
This group of patterns describes the activities of diagram readers			VE1	The information you need if visible		IE1	Interation opportunities are evident
IA1	Search	VE1, VE4, SE3, TE4	VE2	The overall story is clear		IE2	Actions are fluid, not awkard
IA2	Comparison	VE5, SE4, ME4, TE2	VE3	Important parts draw your attention		IE3	Things stay where you put them
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5	VE4	The visual layout is concise		IE4	Accidental mistakes are unlikely
			VE5	You can see detail in context		IE5	Easier actions steer what you do
						IE6	It is easy to refer to specific parts
[2] Construction activities: building information structure							
This group of patterns describes the different ways of manipulating diagrams			**[2] Experiences of structure**			**[5] Experiences of thinking**	
CA1	Incrementation	IE1, PE6	SE1	You can see relationships between parts		TE1	You don't need to think too hard
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5	SE2	You can change your mind easily		TE2	You can read-off new information
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1	SE3	There are routes from a thing you know to something you don't		TE3	It makes you stop and think
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4	SE4	You can compare and contract different parts		TE4	Elements mean only one thing
						TE5	You are drawn in to play around
[3] Social activities: sharing information structure							
This group of patterns describes the activities of people who use diagrams in collaboraive contexts			**[3] Experiences of meaning**			**[6] Experiences of process**	
SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3	ME1	It looks like it describes		PE1	The order of tasks is natural
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4	ME2	The purpose of each part is clear		PE2	The steps you take match your goals
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5	ME3	Similar things look similar		PE3	You can try out a partial product
			ME4	You can tell the difference between things		PE4	You can be non-committal
			ME5	You can add comments		PE5	Repitition can be automated
			ME6	The visual connotations are appropriate		PE6	The content can be preserved
						[7] Experience of creativity	
						CE1	You can extend the language
						CE2	You can redefine how it is interpreted
						CE3	You can see different things when you look back
						CE4	Anything not forbidden is allowed

Figure 6-33 Classification of Patterns in Period 2

Period 3:

	PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams		PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)				
[1] Interpretation activities: reading Information Structures			**[1] Experiences of visibility**			**[4] Experiences of interaction**	
This group of patterns describes the activities of diagram readers			VE1	The information you need if visible		IE1	Interation opportunities are evident
IA1	Search	VE1, VE4, SE3, TE4	VE2	The overall story is clear		IE2	Actions are fluid, not awkard
IA2	Comparison	VE5, SE4, ME4, TE2	VE3	Important parts draw your attention		IE3	Things stay where you put them
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5	VE4	The visual layout is concise		IE4	Accidental mistakes are unlikely
			VE5	You can see detail in context		IE5	Easier actions steer what you do
						IE6	It is easy to refer to specific parts
[2] Construction activities: building information structure							
This group of patterns describes the different ways of manipulating diagrams			**[2] Experiences of structure**			**[5] Experiences of thinking**	
CA1	Incrementation	IE1, PE6	SE1	You can see relationships between parts		TE1	You don't need to think too hard
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5	SE2	You can change your mind easily		TE2	You can read-off new information
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1	SE3	There are routes from a thing you know to something you don't		TE3	It makes you stop and think
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4	SE4	You can compare and contract different parts		TE4	Elements mean only one thing
						TE5	You are drawn in to play around
[3] Social activities: sharing information structure							
This group of patterns describes the activities of people who use diagrams in collaboraive contexts			**[3] Experiences of meaning**			**[6] Experiences of process**	
SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3	ME1	It looks like it describes		PE1	The order of tasks is natural
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4	ME2	The purpose of each part is clear		PE2	The steps you take match your goals
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5	ME3	Similar things look similar		PE3	You can try out a partial product
			ME4	You can tell the difference between things		PE4	You can be non-committal
			ME5	You can add comments		PE5	Repitition can be automated
			ME6	The visual connotations are appropriate		PE6	The content can be preserved
						[7] Experience of creativity	
						CE1	You can extend the language
						CE2	You can redefine how it is interpreted
						CE3	You can see different things when you look back
						CE4	Anything not forbidden is allowed

Figure 6-34 Transition to classification of Patters in Period 3

6.4.5.1.   The Complexity of Access

The issue of access (Saunders et al., 2017) was a live, on-going issue over the course of the study. Access at Forum during Periods I and II was informal in nature and built around strong, existing personal relationships. After the Registration Viva a more formal arrangement was needed. This negotiation set the backdrop for Period III. The formal negotiations surrounding this agreement started in August 2016 and took 9 months to complete. The process involved over 30 meetings as well as multiple calls, conversations, emails and presentations. The final agreement represented a 21 page document (excluding appendices) and was signed in May 2017. The Agreement was far-ranging containing sections from research deliverables, supply of information, confidentiality obligations to health and safety, data protection and legal jurisdiction. An additional complexity required the agreement of commercial terms with Forum to cover the use of the tool should it become externally viable at any stage (e.g. Forum would have access to the tool at a reduced rate for a specified period).
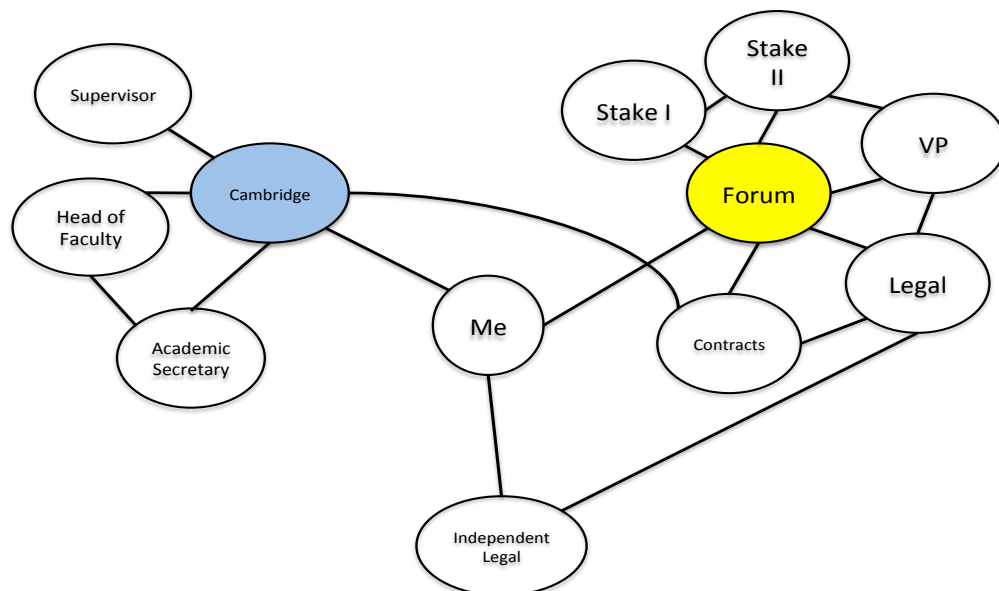
Figure 6-35 Stakeholder map of research access

Access negotiation saw a significant broadening of stakeholders involved in the study. Each step of authorization represented an increased widening of stakeholders - this involved the Senior and Junior sponsors at Forum, the Vice President for Commercial Business as well as contract negotiators and legal representatives. At Cambridge it involved the Head of the Faculty of Education, the Academic Secretary, external lawyers and my supervisor. Finally, the complexity of the issues meant that my interests had to be represented by an independent lawyer.

The negotiations represented a significant drag on the research adding nine months to the time line. More broadly the negotiations highlighted the increasing complexity of doing research inside large organisations (Cunliffe & Alcadipani, 2016). Throughout, the balance of resources and expertise lay with Forum. This gave them a power advantage in the negotiations and called upon significant relational resources to move the process forward. During this time I was struck in particular by the bureaucratic tendencies inside organisations like Forum (Farrell & Morris, 2016). This felt a far cry from the portrayal of corporate speed and agility often seen in the literature (Holbeche, 2018). It also appeared to display how bounded contemporary organisations have become (Roberts, 2003), and how this feature can complicate access at a range of levels. Furthermore, the negotiations exposed the fragile and dynamic nature of stakeholder relations. In the final period of the negotiations (February 2018) the Senior Sponsor changed job and in effect, I had to start afresh in building the case for the research.

6.4.6.　　**Period 4　　'Construction' (April 2017- December 2017)**

The fourth period saw the first attempt at drawing up detailed plans for an interactive working version of the tool. The data capture and analysis underpinning this period was provided by **Tool Design** Interviews, contained within this section. Over a period of seven months I worked closely with a Cambridge computer scientist to code the tool. This process, documented earlier, involved me providing multiple versions of hand-drawn visuals and design briefs to guide the construction of a final working version **(See Figures 6-37 to 44).** Copies of these visuals are included in this section. The associated narrative briefs are included in Appendix N.

In drawing up detailed plans for a working tool the key user of the tool was now the technical designer. Not surprisingly Construction Activities became most important during this period highlighting issues of Transcription [CA2], Modification [CA3] and Exploration [CA4]. This stage focused primarily on the technical aspects of the tool emphasising in particular the experiences of interaction [IE1-6]. It was also important during the period that the tool 'behaved' in a stable manner and ultimately that it did what it was supposed to do (e.g. that the visuals that were created stayed where they were 'put' [IE3] and mistakes were minimised [IE4]) **(See Figure 6-45 to 6-46).**

During this period, it was possible to triangulate the development of the tool with images of e-diaries provided by respondents at Forum. A redacted version of one of these images appears at the top of the next page. **(See Figure 6-36)**
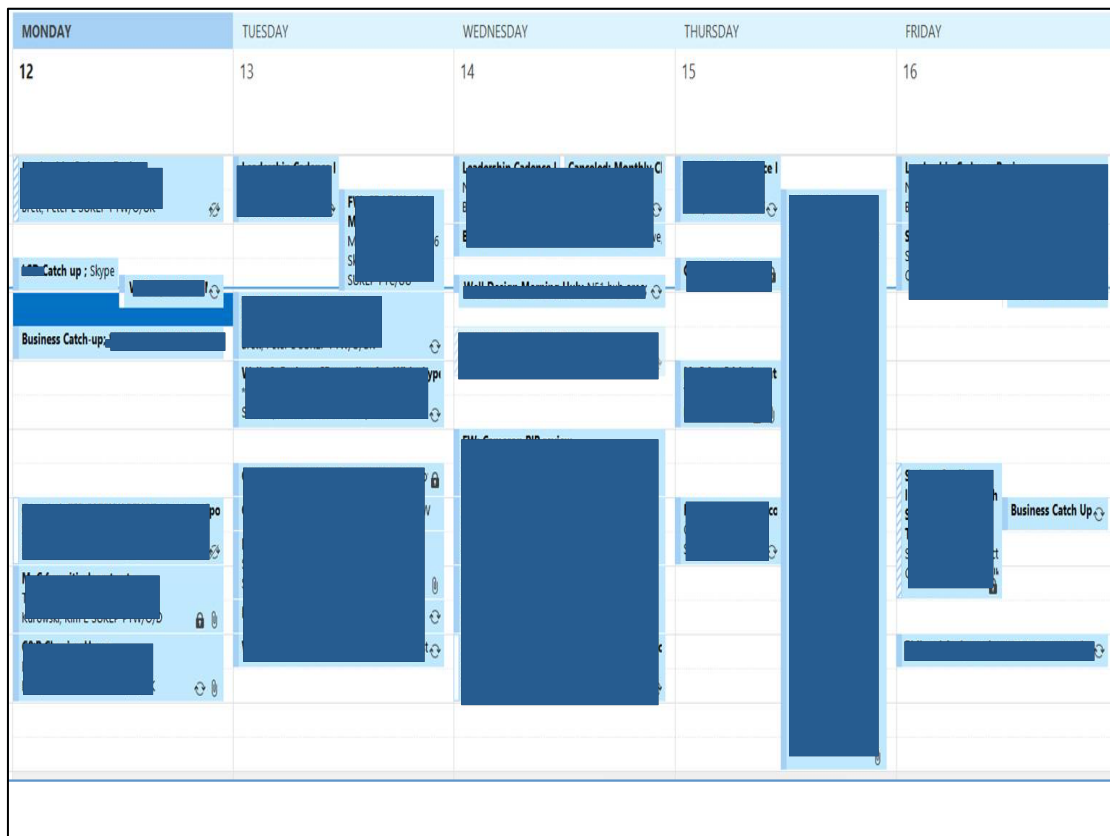
Figure 6-36 Image of e-diary provided by respondent at Forum (redacted)

Figure 6-37 Hand drawn visual – time use
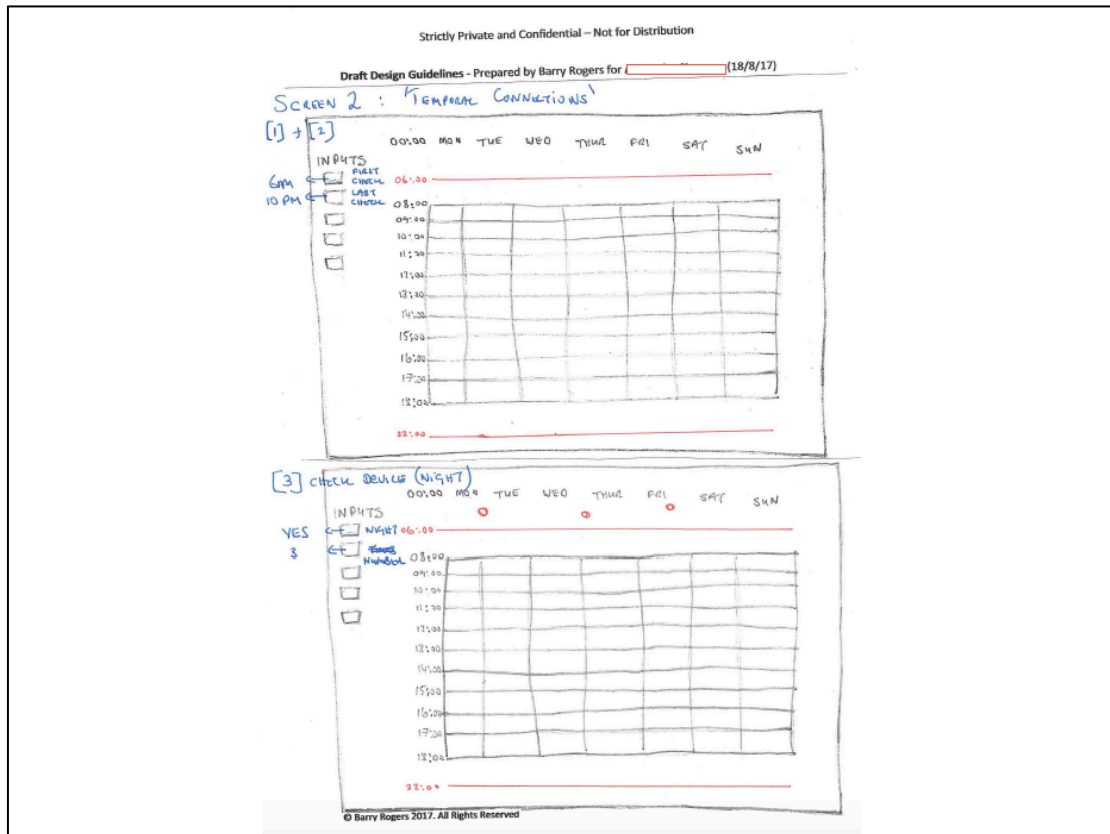
Figure 6-38 Hand drawn visual – first and last meeting
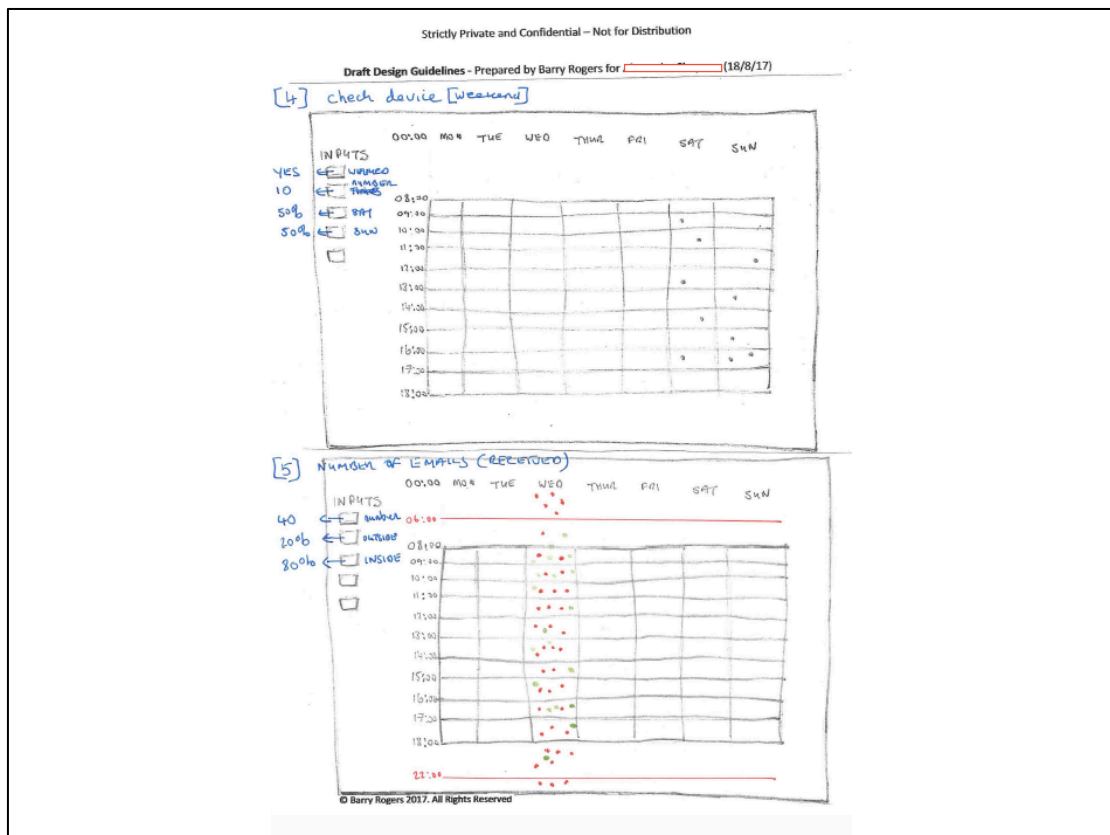
Figure 6-39 Hand drawn visual – nature of interruptions
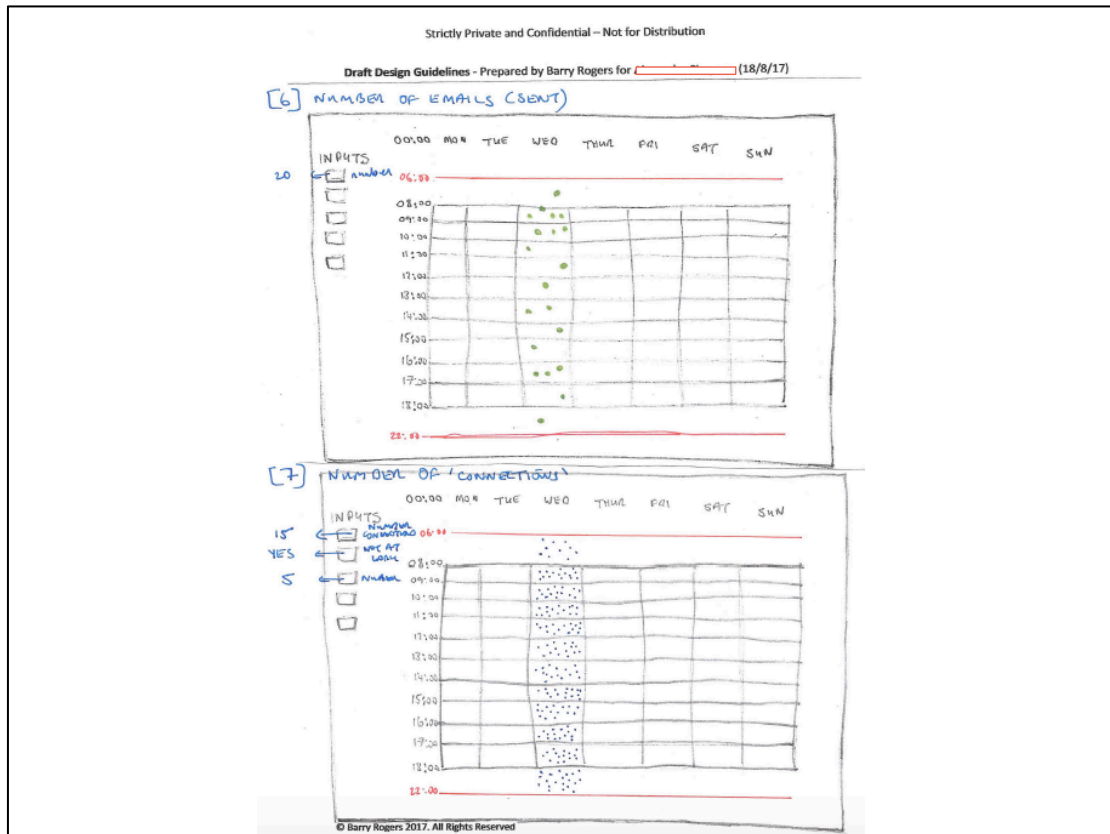
Figure 6-40 Hand drawn visual – nature of interruptions (cont.)
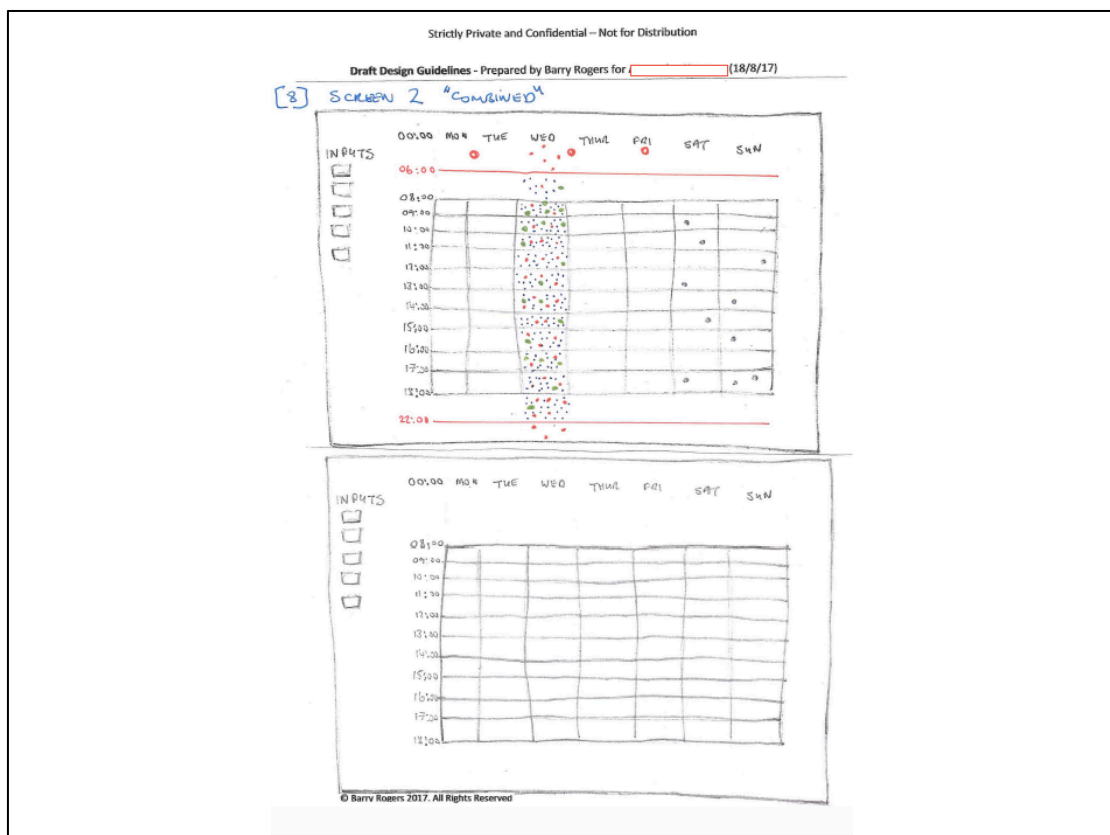
Figure 6-41 Hand drawn visual – nature of interruptions (cont.)
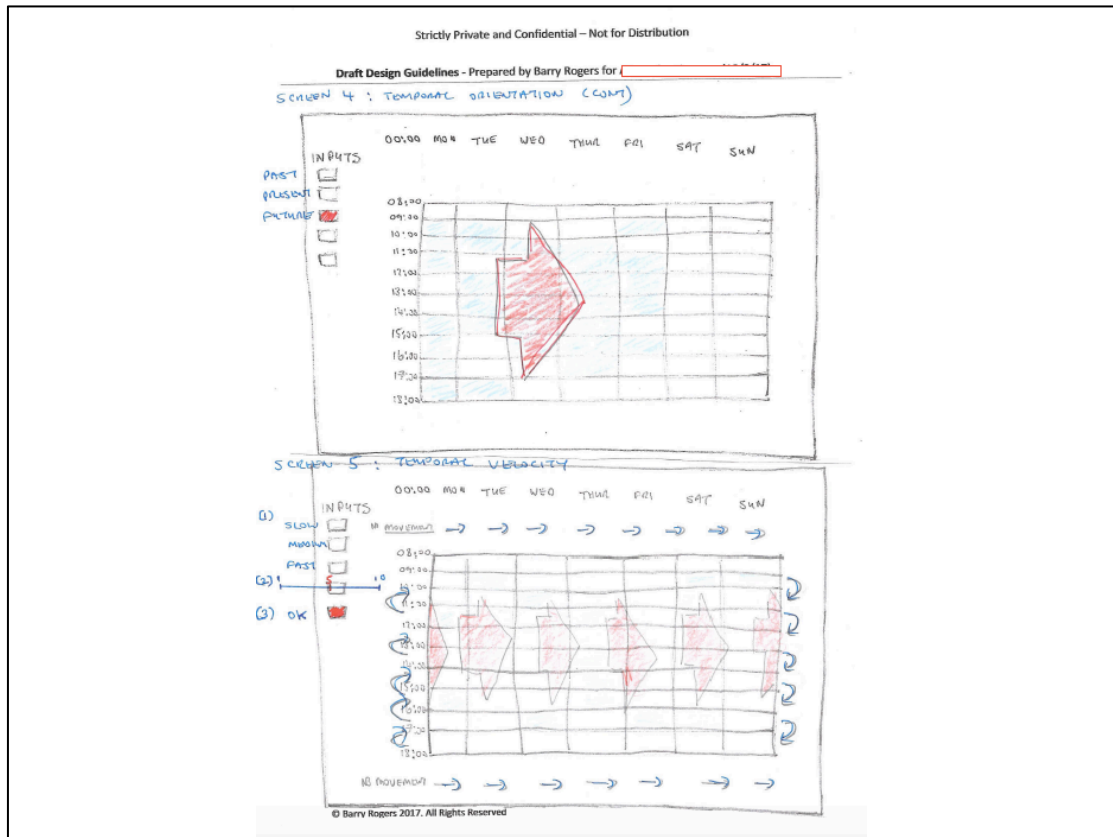
Figure 6-42 Hand drawn visual – temporal orientation
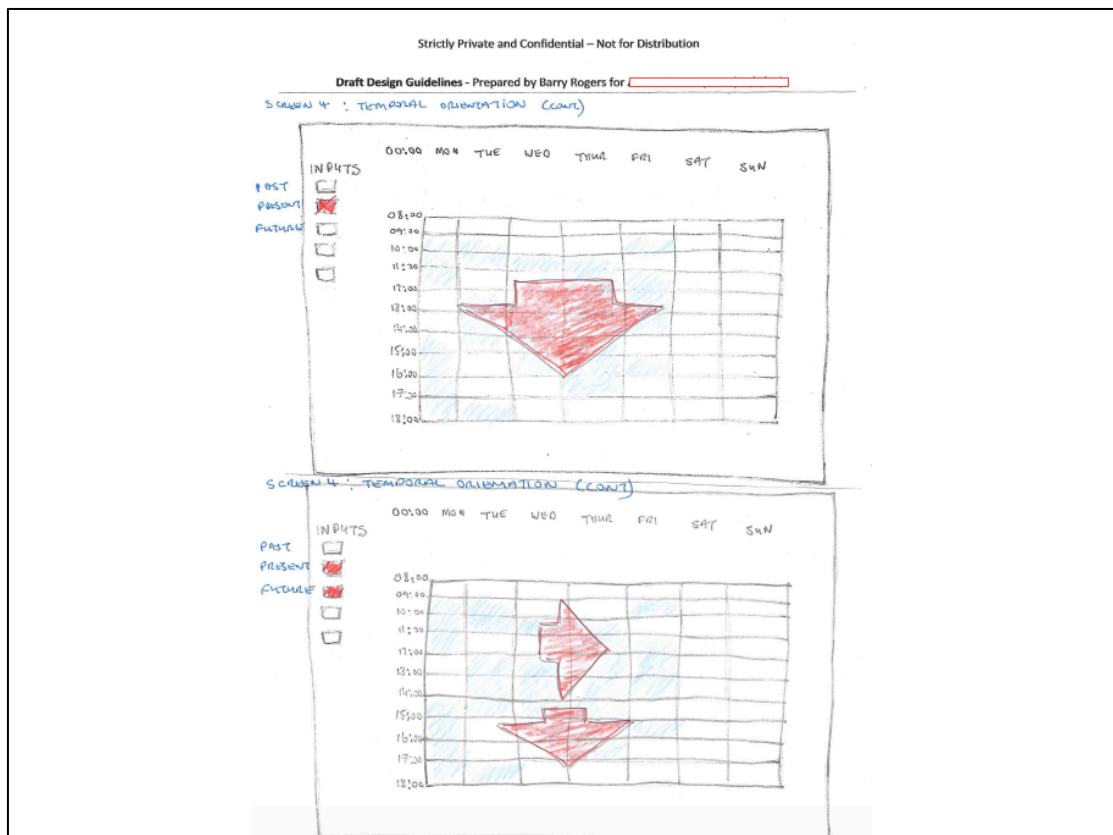
Figure 6-43 Hand drawn visual – temporal orientation (cont.)
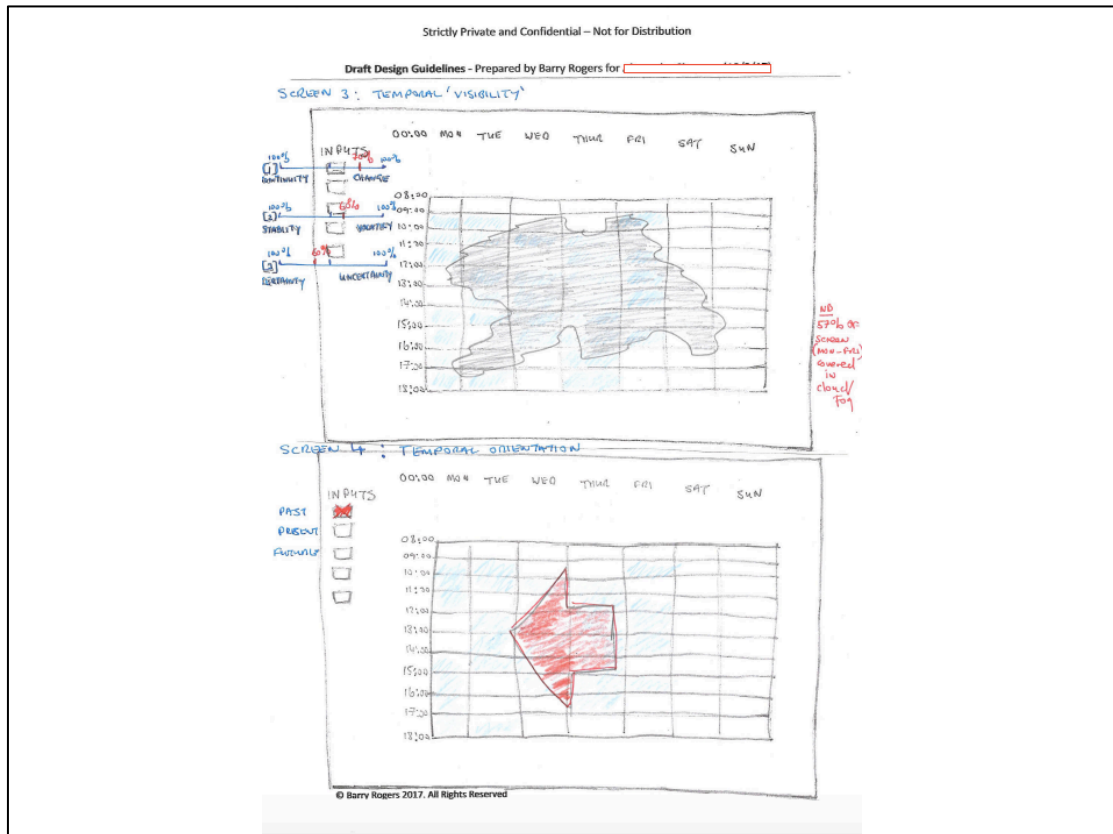
Figure 6-44 Hand drawn visual – temporal orientation and 'fog'

Period 3:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams	PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)	
[1] Interpretation activities: reading Information Structures	**[1] Experiences of visibility**	**[4] Experiences of interaction**
This group of patterns describes the activities of diagram readers	VE1 The information you need if visible	IE1 Interation opportunities are evident
IA1 Search — VE1, VE4, SE3, TE4	VE2 The overall story is clear	IE2 Actions are fluid, not awkward
IA2 Comparison — VE5, SE4, ME4, TE2	VE3 Important parts draw your attention	IE3 Things stay where you put them
IA3 Sense-Making — VE2, VE3, SE1, ME1, ME3, TE3, TE5	VE4 The visual layout is concise	IE4 Accidental mistakes are unlikely
	VE5 You can see detail in context	IE5 Easier actions steer what you do
		IE6 It is easy to refer to specific parts
[2] Construction activities: building information structure	**[2] Experiences of structure**	**[5] Experiences of thinking**
This group of patterns describes the different ways of manipulating diagrams	SE1 You can see relationships between parts	TE1 You don't need to think too hard
CA1 Incrementation — IE1, PE6	SE2 You can change your mind easily	TE2 You can read-off new information
CA2 Transcription — ME2, IE2, IE3, IE5, PE2, PE5	SE3 There are routes from a thing you know to something you don't	TE3 It makes you stop and think
CA3 Modification — SE2, ME5, IE4, TE1, PE1, CE1	SE4 You can compare and contract different parts	TE4 Elements mean only one thing
CA4 Exploratory design — TE5, PE3, PE4, CE2, CE3, CE4		TE5 You are drawn in to play around
[3] Social activities: sharing information structure	**[3] Experiences of meaning**	**[6] Experiences of process**
This group of patterns describes the activities of people who use diagrams in collaboraive contexts	ME1 It looks like it describes	PE1 The order of tasks is natural
SA1 Illustrate a story — VE2, VE4, IE6, TE1, CE3	ME2 The purpose of each part is clear	PE2 The steps you take match your goals
SA2 Organise a discussion — ME5, IE2, TE2, PE3, PE4, CE4	ME3 Similar things look similar	PE3 You can try out a partial product
SA3 Persuade an audience — VE3, SE4, ME2, ME6, IE5, TE3, TE5	ME4 You can tell the difference between things	PE4 You can be non-committal
	ME5 You can add comments	PE5 Repitition can be automated
	ME6 The visual connotations are appropriate	PE6 The content can be preserved
		[7] Experience of creativity
		CE1 You can extend the language
		CE2 You can redefine how it is interpreted
		CE3 You can see different things when you look back
		CE4 Anything not forbidden is allowed

Figure 6-45 Classification of Patterns in Period 3

Period 4:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams	PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)	
[1] Interpretation activities: reading Information Structures	**[1] Experiences of visibility**	**[4] Experiences of interaction**
This group of patterns describes the activities of diagram readers	VE1 The information you need if visible	IE1 Interation opportunities are evident
IA1 Search — VE1, VE4, SE3, TE4	VE2 The overall story is clear	IE2 Actions are fluid, not awkward
IA2 Comparison — VE5, SE4, ME4, TE2	VE3 Important parts draw your attention	IE3 Things stay where you put them
IA3 Sense-Making — VE2, VE3, SE1, ME1, ME3, TE3, TE5	VE4 The visual layout is concise	IE4 Accidental mistakes are unlikely
	VE5 You can see detail in context	IE5 Easier actions steer what you do
		IE6 It is easy to refer to specific parts
[2] Construction activities: building information structure	**[2] Experiences of structure**	**[5] Experiences of thinking**
This group of patterns describes the different ways of manipulating diagrams	SE1 You can see relationships between parts	TE1 You don't need to think too hard
CA1 Incrementation — IE1, PE6	SE2 You can change your mind easily	TE2 You can read-off new information
CA2 Transcription — ME2, IE2, IE3, IE5, PE2, PE5	SE3 There are routes from a thing you know to something you don't	TE3 It makes you stop and think
CA3 Modification — SE2, ME5, IE4, TE1, PE1, CE1	SE4 You can compare and contract different parts	TE4 Elements mean only one thing
CA4 Exploratory design — TE5, PE3, PE4, CE2, CE3, CE4		TE5 You are drawn in to play around
[3] Social activities: sharing information structure	**[3] Experiences of meaning**	**[6] Experiences of process**
This group of patterns describes the activities of people who use diagrams in collaborative contexts	ME1 It looks like it describes	PE1 The order of tasks is natural
SA1 Illustrate a story — VE2, VE4, IE6, TE1, CE3	ME2 The purpose of each part is clear	PE2 The steps you take match your goals
SA2 Organise a discussion — ME5, IE2, TE2, PE3, PE4, CE4	ME3 Similar things look similar	PE3 You can try out a partial product
SA3 Persuade an audience — VE3, SE4, ME2, ME6, IE5, TE3, TE5	ME4 You can tell the difference between things	PE4 You can be non-committal
	ME5 You can add comments	PE5 Repitition can be automated
	ME6 The visual connotations are appropriate	PE6 The content can be preserved
		[7] Experience of creativity
		CE1 You can extend the language
		CE2 You can redefine how it is interpreted
		CE3 You can see different things when you look back
		CE4 Anything not forbidden is allowed

Figure 6-46 Transition to classification of Patterns in Period 4

6.4.6.1.   Tool Design Interviews

This period saw the first form of formal data capture and analysis for the study. In particular the Tool Design interviews involved two sets of structured telephone interviews. The purpose of the interviews was to provide data that would support the initial design of a working tool – they also sought to explore the real-world relevance of the 5 temporal dimensions highlighted in Chapter Four.

First set of Interviews: 'Tool Design I'

Description of Tool Design I

The first set of interviews took place between June and September 2017. Respondents were selected on a convenience basis from those at Forum who had expressed an interest in the tool. Four respondents had participated on *Impact* over the previous 12 months and were chosen in the belief that they would invest time in the session (scheduled for 45 minutes) while being open and honest about the interview process. The three remaining respondents were key stakeholders at Forum including the individual negotiating the access/Intellectual property documentation, a long-term internal collaborator and the Senior Sponsor. These were included to display momentum and progress surrounding the study as well as to provide an understanding of the type of data needed to develop and use the tool.

The telephone interviews were based around the semi-structured schedule produced for the Registration Viva. This schedule had a total of 65 questions with the majority of questions closed and quantitative in nature. The schedule was divided into five sections, each section devoted to a particular temporal dimension - 'Traction', 'Backdrop', 'Direction', 'Pace' and 'Connection'. The five dimensions grew out of the pre-Registration literature review of linear and non-linear time. Based on a belief that these dimensions could inform the development of a visualisation tool I mapped the

proposed linkage between the temporal dimensions, interview questions and possible aspects of visual representation (See Appendix O).
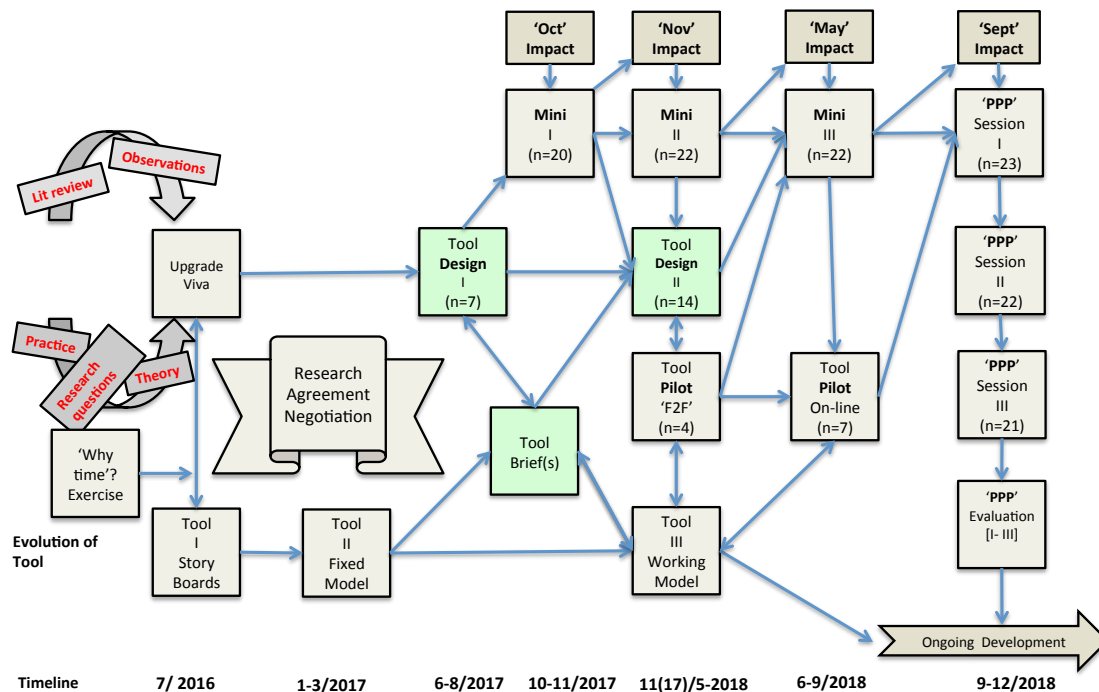
Figure 6-47 Locating Tool Design interviews in the research process

The interviews lasted between 17 and 52 minutes. One interview was face-to-face while the other six were conducted by phone. During each interview I filled out the schedule by hand endeavouring to highlight responses and write notes, when interesting observations arose. All interviews were personally transcribed within 24 hours. Quantitative data was loaded into SPSS for interviews 1-3 and an Excel spread sheet for Interviews 4-7, generating a range of summary statistics. In answering the quantitative questions, each interview respondent was asked to make their 'best, immediate guess' to the questions. This focus on the immediacy of responses was deliberate. The intention was to capture the visceral nature of the respondent's relationship with the dimension as opposed to any deliberate, 'objective' measure. The Participant Information Sheet and Consent Forms for this, and subsequent interviews is included in Appendix A and B.

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Analysis of the interviews was organised around the two primary themes – 'Time' and 'Tool'. Each of these themes coincided with the core themes underlying the two research questions. As a first step in analysis, anything time-related was allocated to the relevant temporal dimension with subthemes developing as the analysis progressed. As a second step, anything relevant to the process of the interviews (e.g. what worked, did not work) was allocated to 'Tool' and followed a similar route of refinement. Coding was initially deductive in nature (led by the dimensions) but increasingly became inductive as new categories and themes developed.

Following transcription and initial coding the interview schedule was refined to reflect learning in terms of content and sequencing of questions. In total eight versions of the interview schedule were employed over the course of the two sets of semi-structured interviews (See Appendix C & D for the first and last schedules).

Quantitative findings from Tool Design I

While the interviews were primarily quantitative in nature, from the outset most respondents were more motivated to talk about the dimensions rather than answer a list of pre-formatted quantitative questions. As a consequence, a significant number of the questions in the first set of interviews were missed (> 50%) and the interviews, in reality, became qualitative in nature. That said, the quantitative findings provided a glimpse into the structure of the respondents' workday. The percentage of the week taken up by meetings was 84% [n=4] while the number of distractions reported in any hour of the working day was 48 [n=3]. On average, respondents reported receiving 51 emails [n=4] and sending 30 in any given day. In terms of the perceived orientation of their working lives, one individual [n=4] indicated a 'future' orientation, one a 'present' orientation and two an orientation to the 'present and future'. No participants indicated a 'past' orientation. The pace of working life was reported as 'fast' by 4 participants while no one described their pace of work as slow. On a sliding scale of 1-10 (with 10 as 'frenetic') the average score for pace of working life was 8.

Qualitative findings from Tool Design I

Note to the reader: verbatim quotes are added to findings throughout the study for the purposes of illustration. Sensitivity over identification of respondents meant that no identifying signs have been added, nor the interview stages noted [Further details relating to this specific provision are available on request]. To offset this a conscious effort has been made to include a range of quotes from a diversity of respondents. Where this does not occur, it is noted.

[1] The role of interruptions and meetings

Throughout all the interviews the respondents were most eager to talk about the interruptions during their working day. Many of these responses related to how communications took place with colleagues. While it might be expected that a traditional landline or hand-held mobile would be the primary means of voice communication this was no longer the case at Forum. Communication voice, video or text) was now carried out via a company-wide 'VOIP' (Voice-Over-the-Internet - Protocol). The system was operated through the employee's laptop computer meaning that this computer had to be operating throughout the working day for calls, emails and instant messages to occur. In particular the role of instant messaging (IM) seemed to play a key role in interrupting respondents – this was referred to as 'pinging' due to the noise that it made when a notification appeared on the laptop screen.

I get so few phone calls anymore, even from externals…if I get 10 phone calls a week I would be surprised. My calls now take place via my laptop using a VOIP system. So the laptop has to be operating all the time and people can see if you are available.

All seven respondents made some reference to on-line interruptions and how these had become engrained in their working lives. Interruptions also seemed to open up a

level of transparency surrounding the respondents' work activities. The VOIP technology made it possible for the on-line status of the employee to be assessed by a colleague at any time (e.g. 'Available', "Busy" etc). The implications of constant vigilance to VOIP channels of communication led to high levels of interruptions throughout the working day.

Easily 100 'checks' in a day…while I am at my desk, I am checking constantly. If something comes up I tend to look at it. I know that there is a rule that says you should not do this.

The largest use of time was taken up by meetings, either face-to-face or virtually. Similar to interruptions, respondents were eager to outline, often in graphic detail, the impact that meetings had on their working lives. The constant, often indiscriminate scheduling of meetings meant that a significant proportion of the working day could be spent going from one meeting to the next – something respondents referred to as 'back-to-backs'. A number of respondents noted strategies to deal with this but these strategies appeared to be fragile. This fragility was especially the case when a meeting request came from someone more senior to the respondent.

If I do nothing to control my calendar it could be 95% of the day in meetings…if I make attempts, you know, play some tricks to keep my calendar free, it is 75-80%

Transparency was also an issue for meetings. The ability of work colleagues to 'see into' a respondent's electronic diary, and to schedule or request a meeting if a space for that meeting was available was referenced frequently. While it was possible for respondents to determine different levels of access to their diary, most claimed that the practice of open or near open access to diaries was commonplace. Even if free space for a meeting was not available there was evidence that colleagues would request an already booked diary slot to be opened up for their meeting.

The whole company can see my calendar, it is fully open so they can see times that are free and (when they are not) they seem to think I can move it

[2] Orientation to time and pace of work

Most respondents judged the pace of their working life to be fast with little end in sight to their workload. This appeared to be a double-edged sword for many. On the one hand the display of being busy was positive in presenting the right impression in front of colleagues. On the flip side there was little evidence of meaningful opportunities for formal reflection, or disciplined consideration of non-immediate matters during the working day.

There does not feel as if there is enough time for self-reflection on myself or on the part of the business I am responsible for. It is pretty hairy most of the time!

The time spent at work seemed to have a distinct quality for respondents. For most, the working day was seen to be somewhere where they followed a 'normal' temporal pattern of 'getting things done'. Anything beyond this (e.g. the change commitment they made on *Impact)* appeared to struggle to find legitimate space within these everyday temporal arrangements. In some way it was not regarded as 'proper work'.

I struggle. If there is something that is more strategic, something that I need to think about…well then I do it in the evening, I make time but it is not in my normal 8-6

[3] Not all questions about time are born equal

While respondents were eager to answer questions about interruptions and meetings, they struggled when it came to talking about some of the other temporal dimensions. This was particularly the case with the macro 'Backdrop' features of the business environment (e.g. the experience of Volatility, Uncertainty, Complexity and Ambiguity – 'VUCA'). Respondents found this question difficult to relate to and

answer. The wording and sequencing of the question were changed on a number of occasions but ultimately, to little effect.

I am sure there is a reason why you are asking me this (laughing)

Discussion for Tool Design I

The first interviews appeared to support a conceptualization of working life defined by dimensions of linear and non-linear time. Within this community the respondents painted a picture, both quantitatively and qualitatively, of days 'full' with commitments and interspersed by on-going interruptions and distractions. There appeared to be little free time, and what was available, was contingent in some way on the discretion of others. Very practically there seemed to be little time available to do the things participants had promised to do after the *Impact* programme (e.g. practise their change commitments). Lack of available time also appeared to be related in some way to whether that type of time was considered to be legitimate or proper.

Conversations about interruptions and meetings dominated the interviews. My belief before the interviews was that distractions and interruptions would be a key temporal feature and that this would be related to the increasing number of connected devices available to users. This proved not to be the case. Instead, one seemingly innocuous tool, the laptop computer, emerged as the primary gateway for multiple routes of communications. Laptop-based communications was not something that could be escaped by respondents as the laptop was their constant companion throughout the day. The role of instant messaging brought an added dimension of intrusion to these interruptions.

Meetings were clearly a significant use of time for respondents. The impression of a 'full' meeting schedule appeared to be compounded by the contingency associated with any free time available in the respondent's diary. Given the level of transparency

offered to other work colleagues, even if a period of time was available during the day it could disappear at a moment's notice. This raised question marks over time ownership and how any available time could realistically be allocated to a particular activity with any degree of certainty.

It was clear during the interviews that not all of the temporal dimensions resonated equally with respondents - some had more 'energy' than others. While interruptions and meetings connected strongly with respondents, others like pace and direction appeared less interesting. Furthermore, some dimensions (e.g. 'VUCA') simply did not connect at all. This raised a very practical question for me. Why were all of these questions being asked if they did not seem to be relevant to the lives of the respondents? Ultimately, I was designing a tool that sought to be useful to the respondents so where did these other questions fit in, if at all?

From the start of the interviews I struggled with articulating and defining the temporal dimensions for respondents. I found it hard to tie down an agreed set of labels for the dimensions, and whatever choice I made, respondents often needed added explanation. As the interviews progressed I routinely found myself using the common sense understanding of these concepts (e.g. instead of 'connections', or 'commitments' I used 'interruptions' 'meetings'). This worked well and made it easier for respondents to understand my questions. It also highlighted the first signs of a gap that would become apparent over the course of the interviews e.g. differences in the use of language that appeared to give insight into wider ontological and epistemological issues between myself and the respondents (Astley & Zammuto, 1992). This appeared to be compounded by the degree of connection respondents felt for some of the dimensions. I started to refer to these dimensions in my notes as being 'hot', 'warm' or 'cold'. The level of connection respondents had for the 'hot' issues created a problem. As they talked about these I found that I was not capturing the quantitative data I had expected and I often (crudely) broke away from the rich accounts of respondents and asked them to answer the quantitative questions. As a

consequence, it increasingly felt that the form of enquiry was having a detrimental effect on the nature of enquiry.

The level of engagement during the interviews was an on-going theme in my post interview notes. This issue seemed to be tied to the nature of the data collection process – a long, formal interview schedule. As the interviews progressed I could hear an element of fatigue entering into the tone of responses. I found myself making excuses about asking some of the questions and frequently missing out on others, almost afraid to ask them. Creating and maintaining engagement therefore appeared to be a key challenge in the development of any usable tool. How could I engage with respondents in a way that connected with the rhythm and tone of their context? A comprehensive, semi-structured interview did not seem to achieve this.

Finally, the way that questions were asked also appeared important. While working with me on the *Impact* programme, respondents had built an expectation of dealing with me in an informal and relaxed manner. Now, wearing a researcher's 'hat' I appeared to be different. I was more distanced and removed. Once again the issue of tone appeared to be related to the context of the respondents. All of the interviews took place while respondents were at work. This meant that they were in the presence of distractions and unanticipated events as they were undertaking the interview. I had considered asking them to find a quiet space for the interview session but that request seemed at odds with the nature of the study and the topics being discussed. None of the initial interviews went exactly to plan and, mirroring real-life, I started to accept that the nature of the context would always get in the way of the 'perfect' interview plan. Practically, if I was to operate credibly within this context it appeared that I needed to reduce the number of questions, understand which of the questions really mattered and endeavour to match the tone of my enquiry to that of the context.

As I revisited these initial interviews over the course of the analysis, it became clear that assumptions played a big part in the mental model I employed in constituting the

legitimacy of time use (Bhattacharya, 2017; Ferguson, 2019). Only at the later stages of tracing analysis did I realise how I had 'glossed over' aspects of time use that did not fit with my initial perception of legitimate time use. This was particularly the case in relation to gender and non-traditional work arrangements (Featherstone, 2020). In my initial analysis of the data I appeared to be blind to certain types of responses from at least two respondents ('I need to leave early most days to pick up my son'). This type of response did not 'fit' with what I was hearing from the majority but it still represented a legitimate statement about what was important to the respondent. This ultimately raised a key question for me in terms of how the tool might be used on an on-going basis. To what extent might the assumptions of the researcher (me) allow the tool to reinforce existing temporal stereotypes? I address this question in greater detail in the final chapter.

The thematic analysis of the first set of telephone interviews produced the thematic map in Figure 6-48. Two key themes were present, 'Time' and 'Tool'. The theme of time was supported by the content of the interview schedule and was built around the findings and interpretations of the temporal dimensions. The perceived 'temperature' of these dimensions is reflected in the colour of the codes with meetings and interruptions in orange (e.g. hot), while the VUCA dimension is blue (e.g. cold). The theme of 'tool' was supported by note-taking during and after each interview and sought to capture how the *process* of the interviews (as opposed to the content of the interviews) might shape the form of enquiry eventually undertaken by the tool.
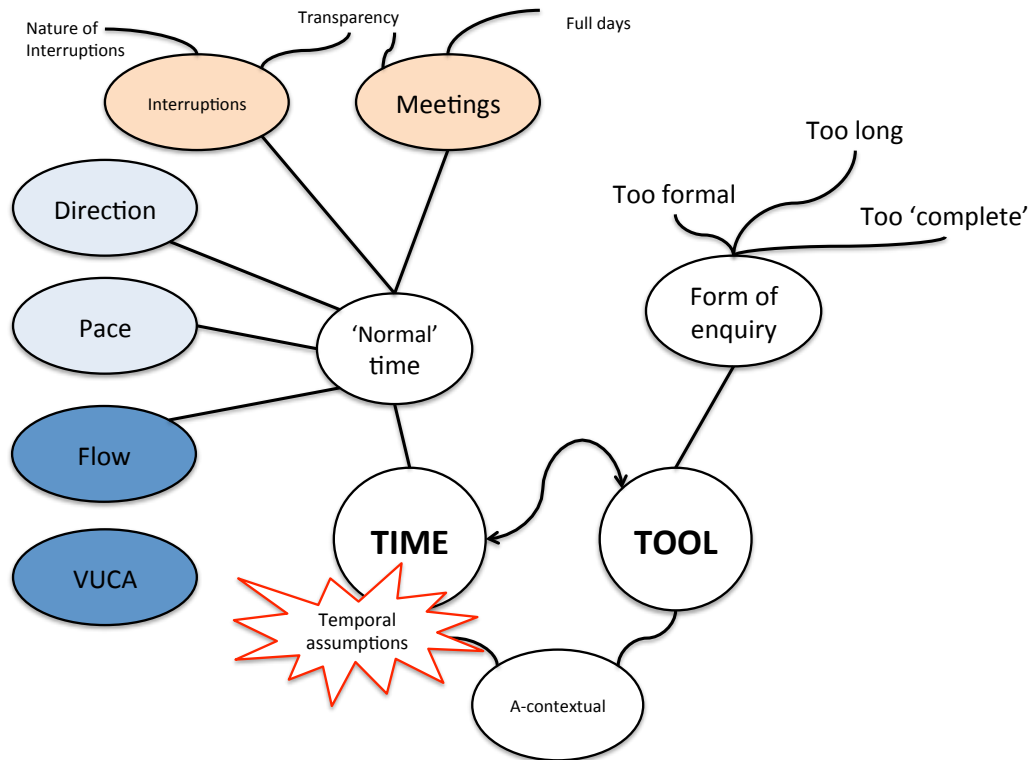
Figure 6-48 Thematic Map for Tool Design Interviews (I)

Second set of Tool Design interviews: 'Tool Design II'

Conscious of the issues with the form of enquiry, I undertook a second (revised) set of Tool Design interviews with a sample of participants from the 'November' Impact programme. This took place in February 2018. The purpose was to incorporate the learning from the first set of telephone interviews and see if an amended semi-structured interview schedule could be more successful. The schedule was reduced in size, was shorter (25 minutes) and there was greater emphasis on questions surrounding meetings and interruptions.

Description of Tool Design II

The November Impact program took place between 13th-17th 2017. Invitations to participate in the interviews were sent to all programme participants (n=23) on February 5th 2018, 81 days after the end of the program. The initial invitation

produced a relatively low take-up (6 respondents) resulting in two follow-up e-mails Ultimately a total of 14 respondents (61% of the original program participants) agreed to be interviewed. The profile of respondents was similar to those in the first set of telephone interviews. Interviews ranged in length from 12 to 35 minutes and took place 91 days (mean average) after the end of the programme. All interviews were recorded and transcribed within 24 hours. The same process of analysis was employed as the first Tool Design Interviews.

Quantitative findings for Tool Design II

The quantitative findings for Tool Design II were broadly in line with those of the first interviews. Once again it was not possible to ask all the questions to each respondent but the response rate was higher, due largely to persistence in seeking a response.

In these interviews the percentage of the working week taken up by meetings was 67% while the number of distractions reported in any give hour of a working day was 13 [n= 8]. On average respondents received 54 emails [n=13] during daily working hours and sent 33 emails. 7 participants [n=13] indicated an orientation of their working life towards the future, 3 to the present and 2 a mixture of the present and future. Only 1 participant reported an orientation to the past. 10 respondents (n=12) reported the pace of their working life as fast while 2 said it was medium. None of the respondents described their pace of life as slow. On a sliding scale of 1-10 (with 10 as 'frenetic') the average score for pace of working life was 7.9.

Qualitative findings for Tool Design II

[1] A world of interruptions and meetings

Interruptions and meetings continued to dominate the responses during the second interviews. References in particular to the intensity of interruptions were note-

worthy – words such as constant, on-going, never-ending and continual were commonplace.

This morning is an example. It is a Monday morning and everyone is back to the office and everyone is super keen – you come in planning to do one thing and it's 11 AM and I have not done that thing I was planning to do yet. I have been responding to emails that keep flashing up.

Different types of interruptions became evident during these second interviews, specifically the role of physical interruptions. For a sizeable number of respondents this involved seemingly simple issues like a colleague appearing unannounced at their desk or being stopped in the corridor for a chat. Respondents related the persistence of physical interruptions to the open-plan nature of the office space, a factor that seemed to give physical transparency to life in the office environment (e.g. it was easy for someone to see if a respondent was at their desk or not).

In my previous role it was constant. People in my team just walking over to my desk and debating the issues of the day. This was quite persistent.

Longer-term disruptions also played a role in upsetting the normal flow of working life. An example of this came in the form of job turnover. Forum had an established culture of transferring key executives between job roles every 2 to 3 years. This turnover appeared to provide another opportunity for some respondents to shift focus away from their stated change commitments. This job move now took precedence over the commitment but invariably they felt confident that they would return to it at a later date, when 'normal' times returned.

I will be moving to a new role in Bangalore from July…that will give me more time to focus on this (commitment)

Frustration with the number of meetings in the working day continued to exercise respondents. There was a strong belief that meetings at work took on a life (and logic)

of their own and that this crowded out the necessary time to do 'real' work. As a consequence, the desire to create meaningful time for other areas of priority (e.g. a change commitment) appeared to roll into some aspirational future. One respondent powerfully described this as the on-going desire he had to 'purchase' time to get things done.

I have often said that there is no time to <u>do</u> the work...that you spend your time

Inability to reflect during the working day was a significant topic. Respondents appeared to compensate for a lack of formal reflection time by focusing on reflective acts outside the normal (temporal) boundaries of the working day. When opportunities for formal reflection did occur, they appeared to be directed towards aspects of the respondents (current) tasks and activities as opposed to their (future) commitments.

I hardly ever reflect (at work)! Reflection comes bizarrely when I am driving to work or when I am driving home in the evening and over the weekend.

[2] *Learning* knowledge versus useful knowledge

Four respondents made a link between acquiring knowledge on the *Impact* programme and the challenge of operationalizing that knowledge in the workplace. The distinction between these two types of knowledge appeared to have their roots in the day-to-day practices of the respondents and the pull that these practices had in forcing a 'return to type' after a programme. Overall this seemed to be a familiar experience for many of the respondents with the majority struggling to practise their commitments.

It is always the problem with these types of courses, trying to take what you learn and then operationalize it (specifically) on a day-to-day basis...it is a real effort

A minority of respondents (3) appeared to have maintained a degree of disciplined focus on their change commitments. As a consequence, two of the respondents noted that their commitment had changed since the programme and had continued to evolve and develop in the workplace.

I still focus on my learning but this has had to change

[3] So what?

There were indications from a number of respondents of some frustration with the interview process. One participant got to the end of the interview and clearly believed that he was due something more tangible for the investment of his time. Increasingly I found myself aware of a fatigued tone from respondents. As the interviews progressed I become ruthless in managing the time and, similar to the first set of interviews, often sounded apologetic for some of the questions I was asking.

Do you mind me asking…is there any form of practical feedback from this process

Discussion for Tool Design II

The second set of Design interviews painted a clearer picture of the respondents' temporal context, with many of the qualitative themes supported by the quantitative data. The sheer volume of time dedicated to some of the dimensions (e.g. meetings) raised questions in my mind over the availability of time to practise commitments. Where were the opportunities for practising if so much time was allocated to existing routine activities? Maybe it could be argued that a meeting would be the focus for an act of practising but this would require other times in the day for preparation and it was not clear when these times took place. Alongside this a more complex picture of the role of interruptions emerged. The role of physical interruptions had not been anticipated in the original design, nor the part played by longer disruptions. Whatever their nature, it would seem likely that they all had implications for the attention levels

of respondents (Newport, 2016), something that left a negative trace on intentionality (Leroy, 2009) and further reduced the capacity to practise.

It was also obvious that the so-called 'lesser' dimensions played a potentially powerful role in practising. The quantitative scores for temporal orientation and pace of life were cases in point. The preference among the majority of respondents for future orientation, combined with a fast pace-of-life appeared to reinforce how time for formal reflection got squeezed out of the working week. If a respondent made a commitment to change on a programme it would seem reasonable to suggest that they would need time to think further about this commitment, and consider plans for implementation when they were back in the office. But this was not the case for the majority of respondents. Similar to Mintzberg's (Mintzberg, 1980, 2008) seminal findings, respondents appeared to be drawn relentlessly to a future orientation and pulled towards an open-ended state. How realistic was it therefore that a commitment remained important to the respondent as time passed and new priorities emerged in the workplace?

This choice on my behalf to deprioritize the 'lesser dimensions' and ask a smaller set of questions was not a neutral decision. Ultimately, what was a high value question? And who was it high value for? Increasingly these decisions were tied up with the choices and trade-offs I had to make as part of the tool design process. In making these decisions however, I was conscious I was giving up some of the richness within the tool and potentially reinforcing stereotypes. I will return to the issue of temporal stereotypes in the final chapter.

Despite the reduced size of the schedule, I continued to be challenged by the formal schedule format. For some reason the number of questions in the schedule tended to place the completion of the schedule, as opposed to the process of authentic enquiry, as the ultimate purpose of the exercise. It became clear over the course of the interviews that if I was to respect the stories and experiences of respondents, I needed a different approach to enquiry, one that employed a reduced number of

questions and gave more space for respondents to talk. It was also clear that a separate session for asking these questions was not practical and that a smaller set of questions should be incorporated into the first session with the tool.

The interviews provided the first signs of meaningful frustration with the enquiry process. Reflecting on this I came to see that how my positioning during the interviews was potentially the issue. Over the course of the interviews I was in researcher mode, sitting on the mountaintop observing the situation of the respondents. Despite my avowed mediating stance (See Chapter One and Five), my interest during the interviews was primarily academic. The respondents however had a very different perspective. Sitting in the messy swamp, running from one meeting to the next and bombarded by interruptions, they sought something useful and practical as an output from the interactions. This chimed nicely with the notion of different 'thought worlds' (Cascio, 2007; Wefald & Downey, 2009). Ontologically they were seeing the same reality as me but in a different way to me. This was becoming a very important theme - the issue of ontological connection. If the tool was to be useful to respondents, it had to be associated with aspects of their reality that they valued e.g. tools and techniques for helping them with their commitments. I also had to get closer to their world if I was to credibly connect with it.

The passage of time appeared to be a factor in recruitment for these interviews. The interviews took place an average of 93 days after the November *Impact* programme and required 3 emails to reach the eventual 56% attendance. This raised a question mark over the role of time <u>ahead</u> of the use of the tool. It also made me wonder if I needed a pre-engagement strategy for getting respondents to use the tool in the first place?
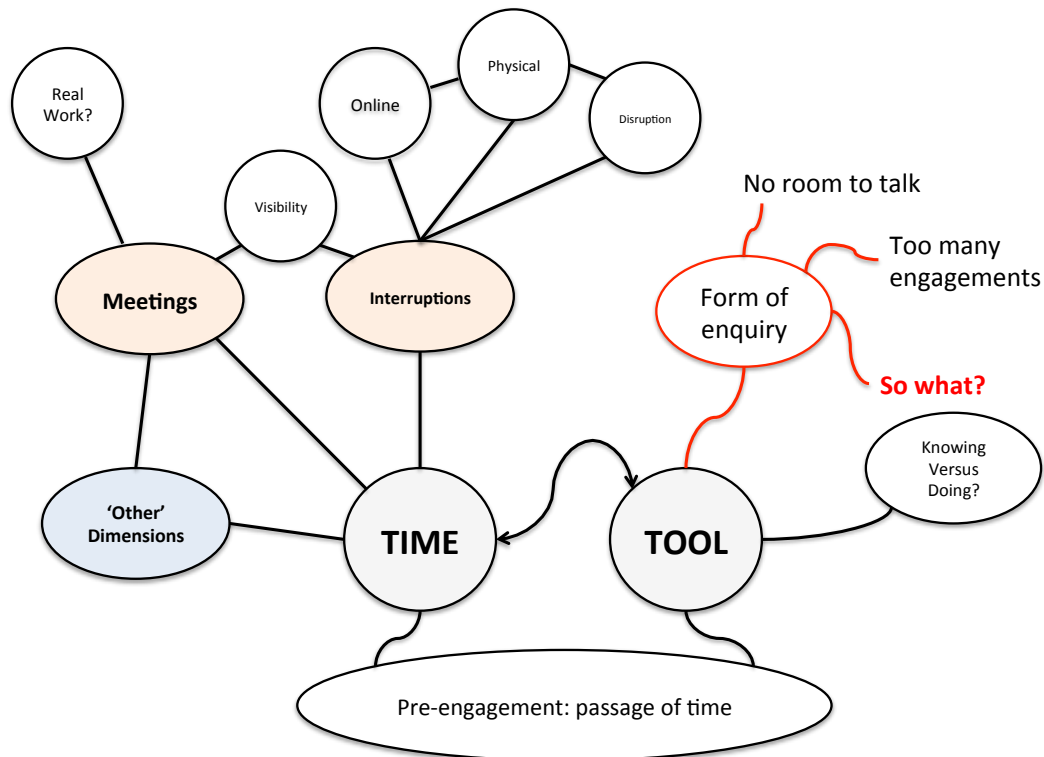
Figure 6-49 Thematic Map for Tool Design Interviews (II)

The thematic diagram for the second set of Tool Design interviews (Figure 6-49) continues to show the two central themes of time and tool but also recognized that these themes (via the pre-engagement bubble) rested precariously on temporal issues that existed before engagement with the tool took place. The warm (orange) dimensions of meetings and interruptions were now more complex both in themselves, as well as in how they related to one another. Relegating the 'colder' (blue) dimensions, though necessary as a trade-off in the design of the tool, raised questions marks surrounding the wider understanding of these dimensions as well as their role in the lives of the respondents. The suitability of the form of enquiry (a comprehensive multi-question interview format) was captured in red to highlight it as a weak link in the tool design process.

Learning from Tool Design I & II

The findings and analysis from the two sets of telephone interviews provided the data for the initial design of the tool, but also changed how that tool was positioned and used. It was clear that a comprehensive approach to data collection ahead of the use of the tool (e.g. a semi-structured interview) was not optimal and that a separate data collection leg before tool use was not practical. As a consequence, the number of questions would have to be reduced significantly (8-10) and the tool employed during the first interaction with the respondent. While the five temporal dimensions were still incorporated into the design of the tool, the dimensions most likely to be generative and impactful related to meetings and interruptions and therefore they had priority in the physical set-up of the tool. Finally, as I facilitated the use of the tool I needed to be aware of connecting with respondents in a way that linked with their reality. This had implications for the tone and format of the sessions (e.g. how the enquiry seemed credible to the respondents and how I showed up as a researcher).

6.4.7. **Period 5 'Operational simplicity' (January 2018 – August 2018)**

An initial working model of the visualization tool was completed in February 2018. Four updated versions of the tool were refined over the next five months following feedback from potential users. Data capture and analysis underpinning this period was provided by the **Tool Pilot** interviews included in this section.

 The interface of the working tool sought to capture the five temporal dimensions in visual form. The diagrams in this section are screenshots of the visuals generated by the tool. The figures **(6-50 to 6-61)** include:

- **6-50**   % of weekly meetings with back-to-back meetings (in red)
- **6-51**   % of weekly meetings with contingent meetings (striped)
- **6-52**   number of e-mails received in a day
- **6-53**   number of e-mails sent in a day
- **6-54**   number of interruptions in a day
- **6-55**   start and end of the working day
- **6-56/9** preferred temporal orientation
- **6-60**   VUCA world – temporal 'fog'
- **6-61**   combination of dimensions

The importance of visual impact became evident during the pilot interviews for the tool. It was clear from early in the interview process that some temporal dimensions/visuals had more 'energy' than others e.g. meetings and interruptions. This highlighted how certain diagrams seemed to attract the attention of users more, drawing them in [VE3], making them think differently about their relationship with time [TE3] and most of all, starting the process of play with the dimensions [TE5]. This ended the belief in my mind that the tool represented some full and comprehensive suite of diagrams - in reality the sense-making of users [IA3] was tied to the partial use of the tool [PE3] (e.g. the user did not need to experience the whole process of visualisations and would most likely disengage after a relatively short period). These

aspects of design were placed into stark relief when the on-line version of the tool did not work during the second set of Tool Pilot interviews. Ultimately the information needed for the tool had to be visible on the screen if the tool was to be used [VE1]. This placed a premium on operational simplicity minimizing any unnecessary complexity in the diagram structure, design or navigation. **(see Figure 6-62 to 6-63)**
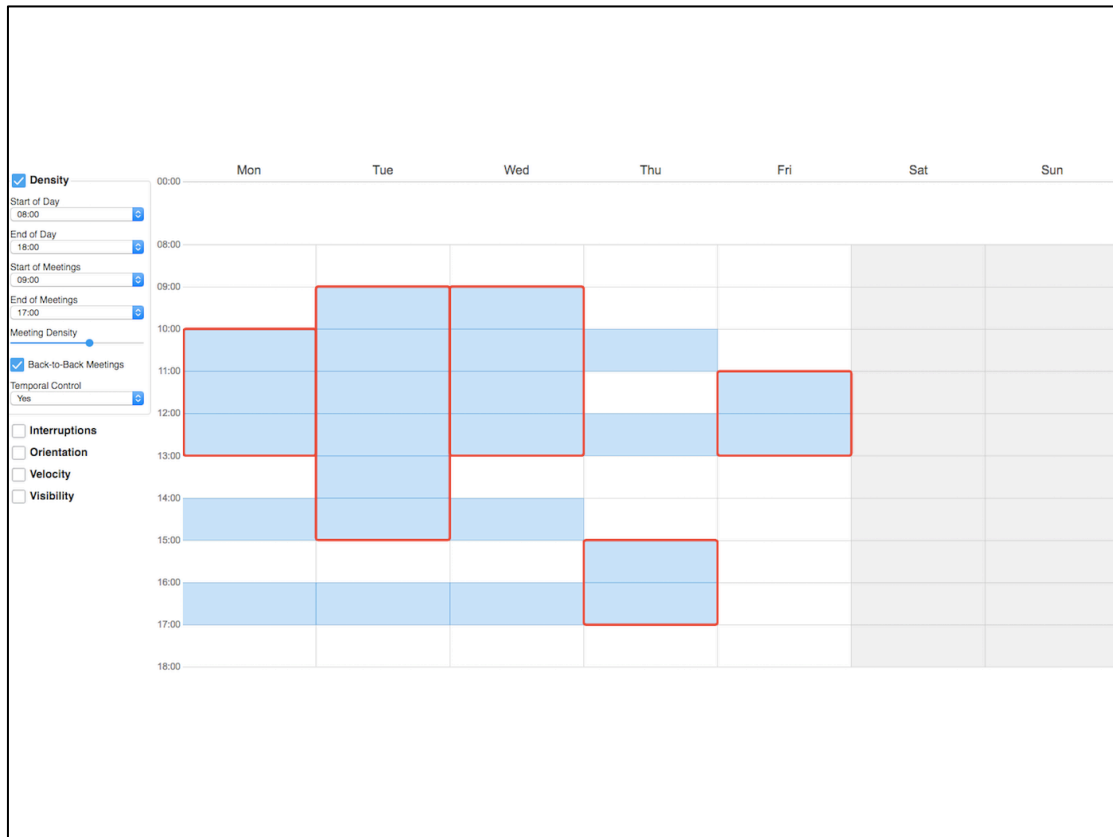
Figure 6-50 % of weekly meetings with back-to-back meetings (in red)
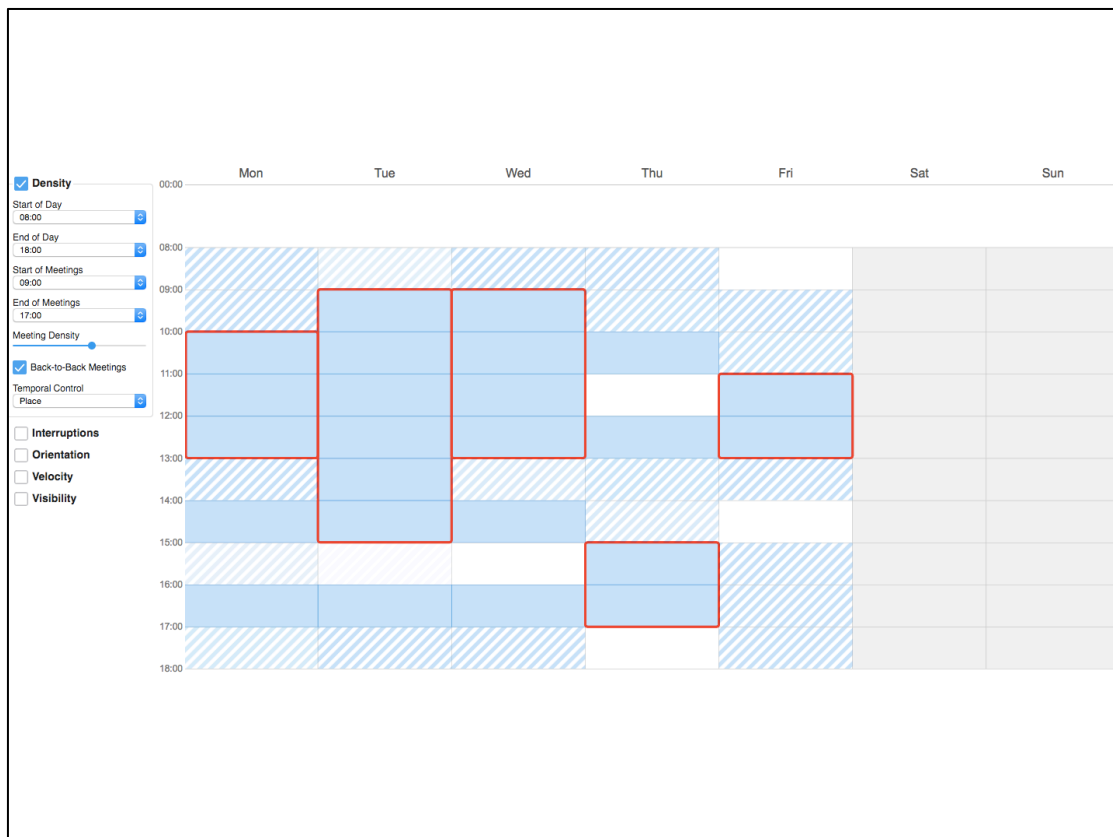
Figure 6-51 % of weekly meetings with contingent meetings (striped)
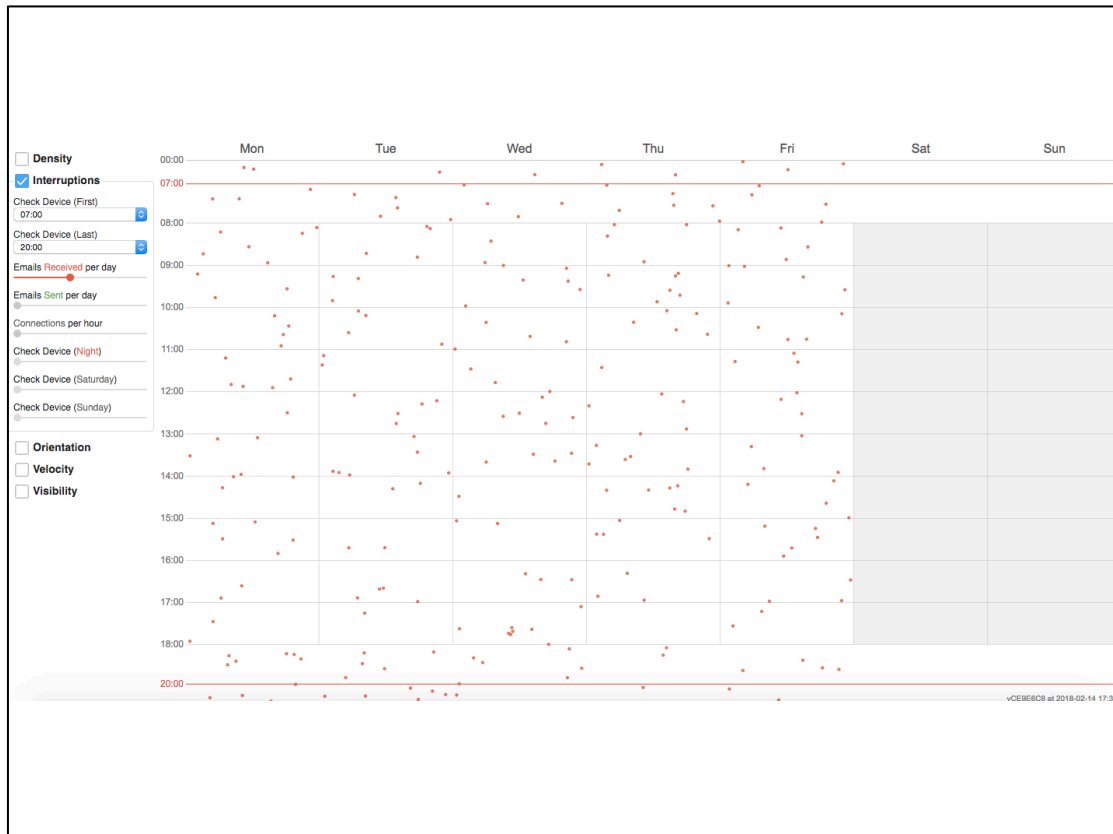
Figure 6-52 Number of e-mails received in a day
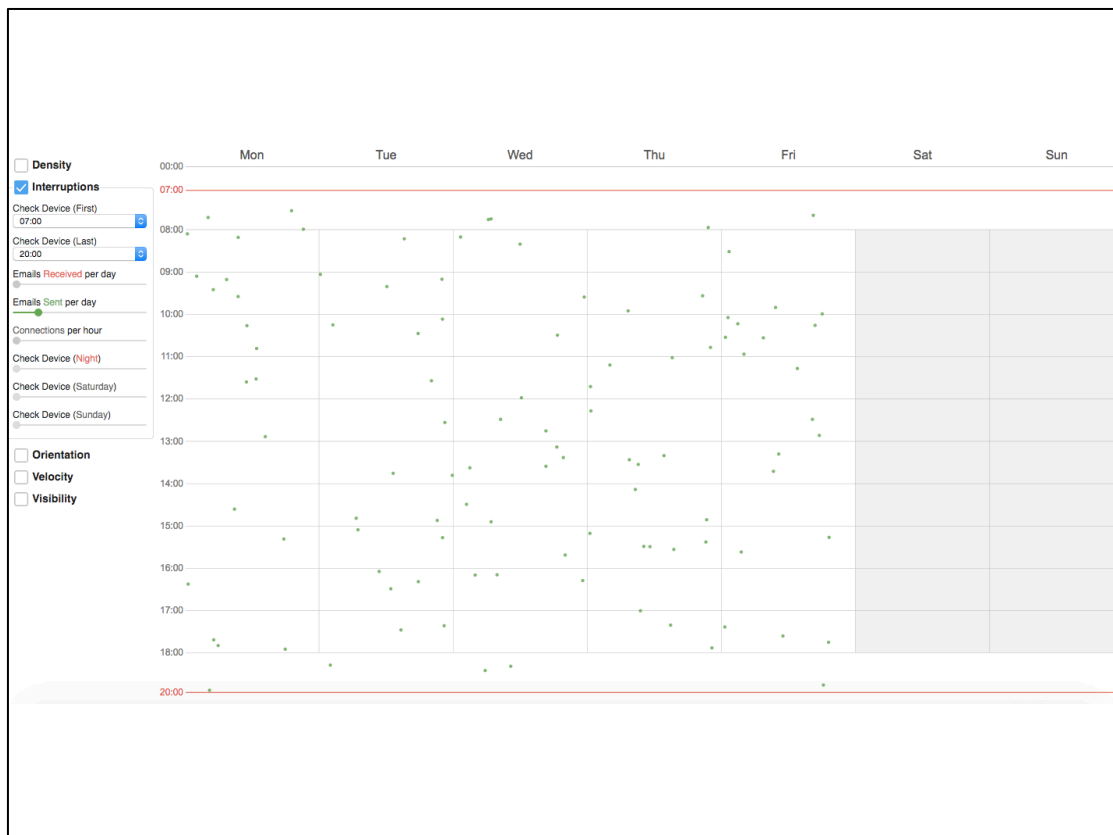
Figure 6-53 Number of e-mails sent in a day
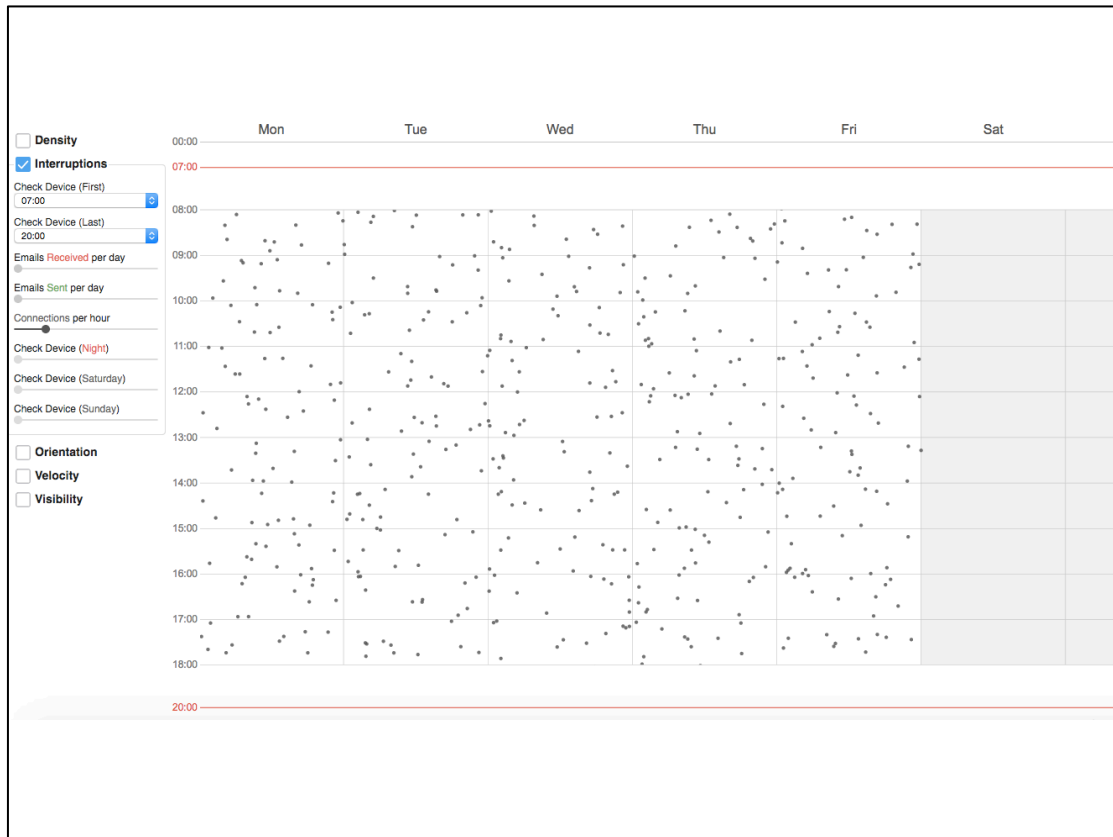
Figure 6-54 Number of interruptions in a day
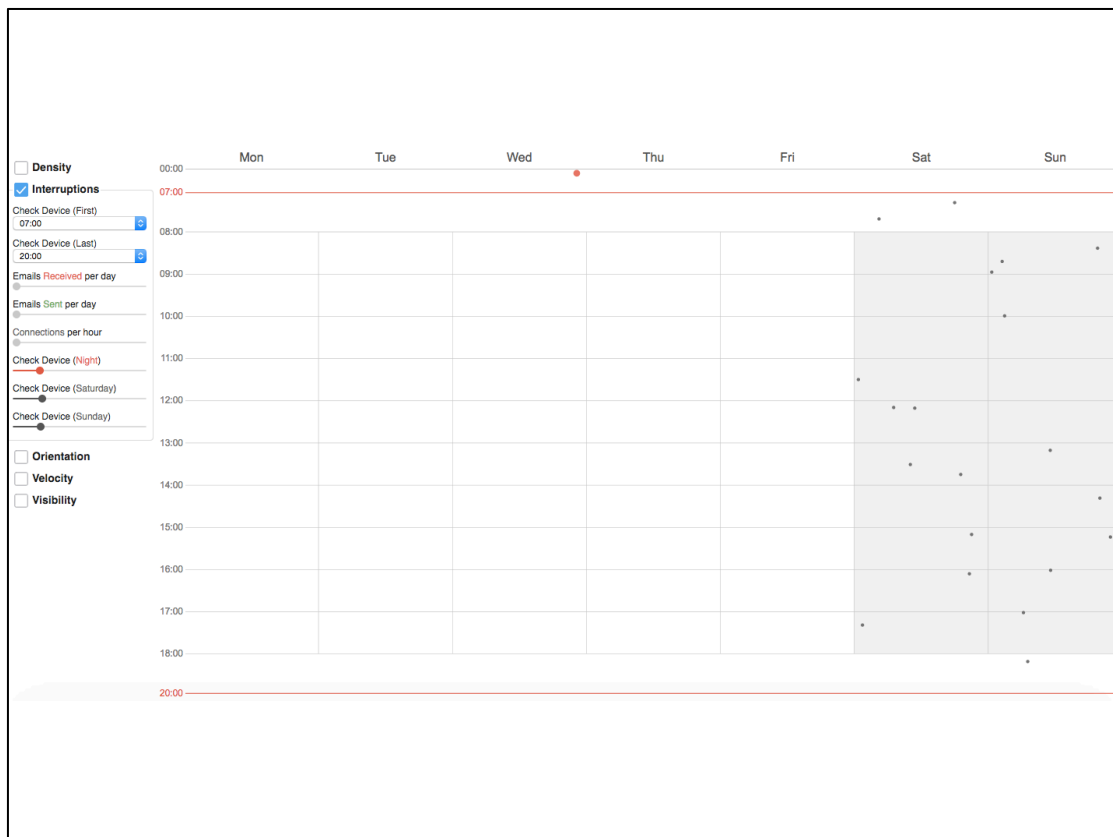
Figure 6-55 Start and end of the working day
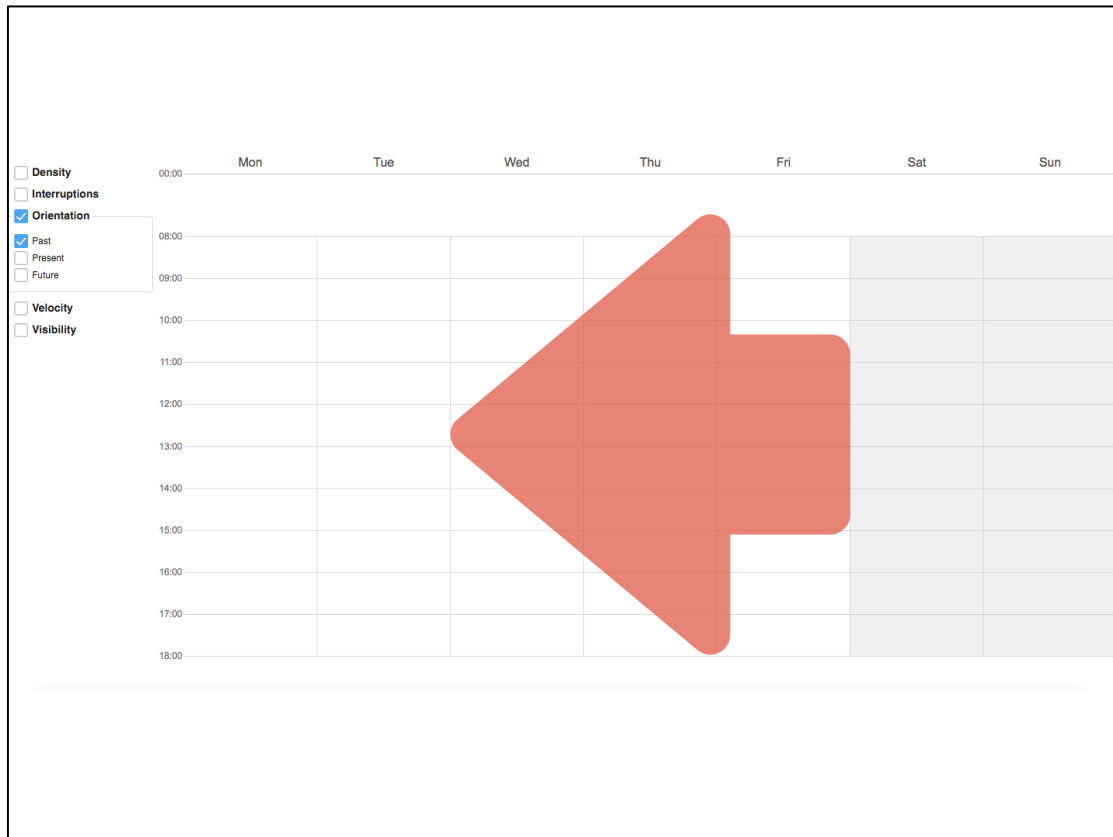
Figure 6-56 Preferred temporal orientation
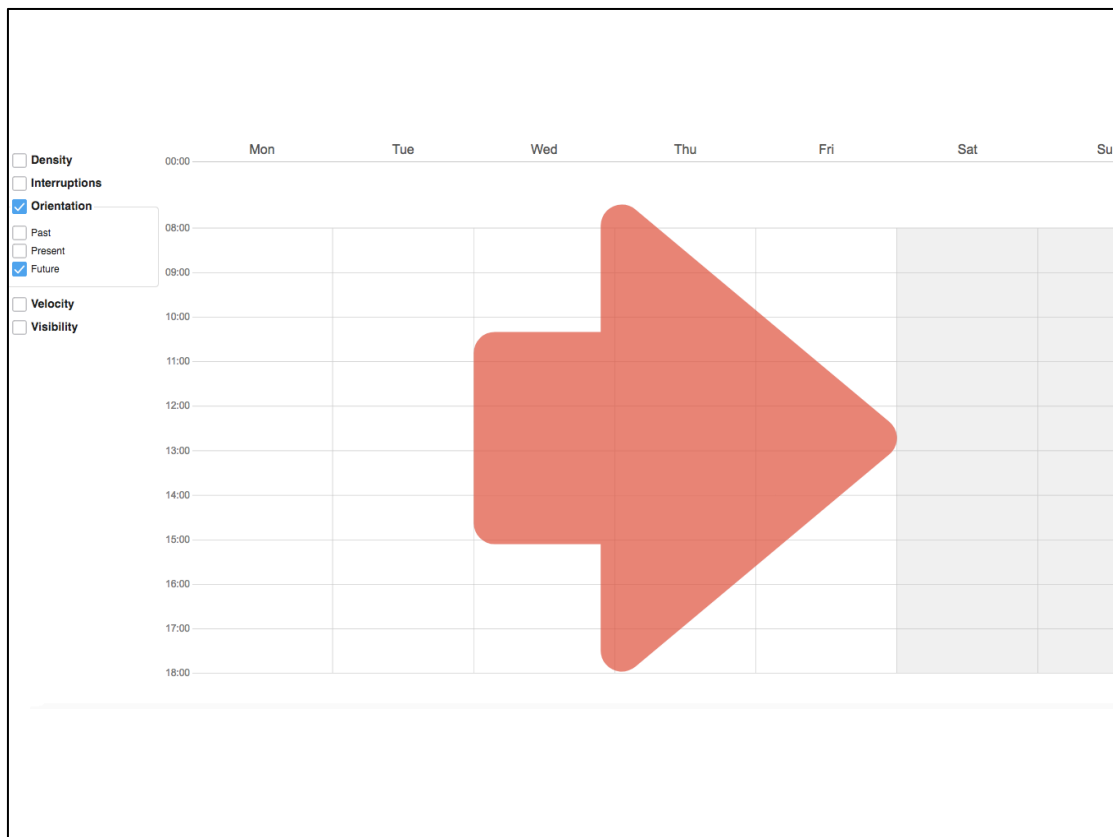
Figure 6-57 Preferred temporal orientation (cont.)
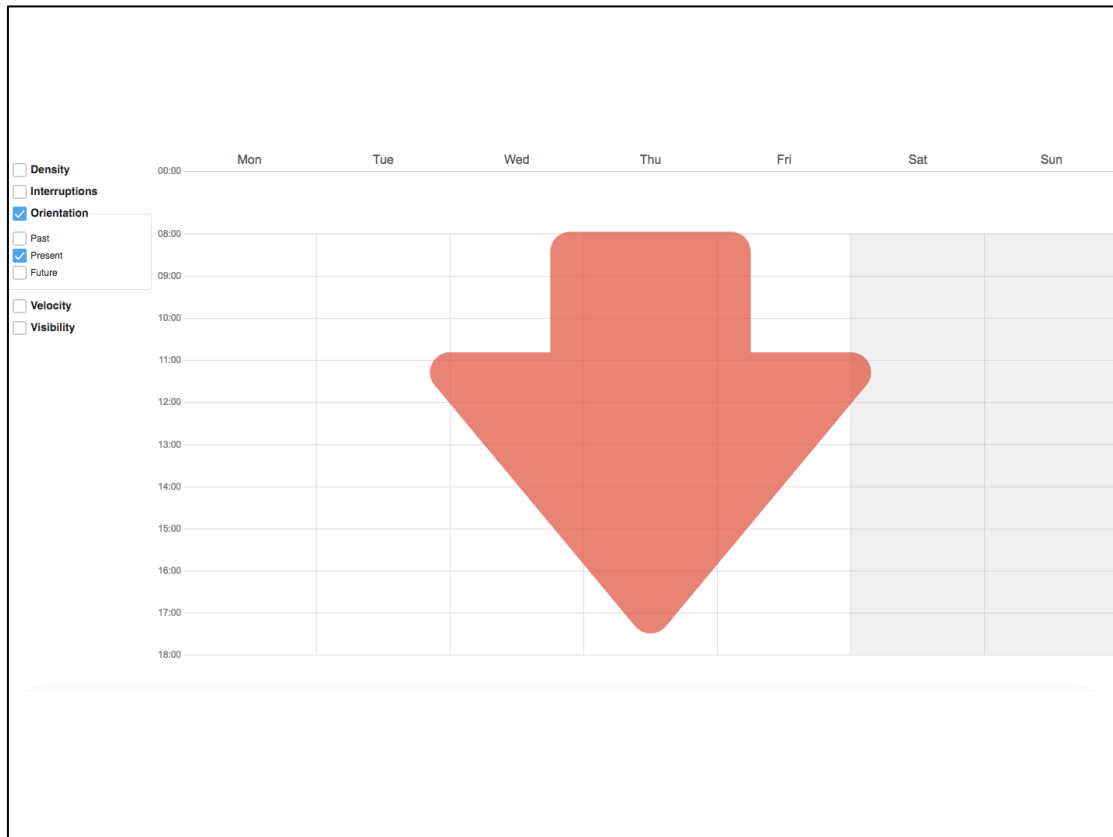
Figure 6-58   Preferred temporal orientation (cont.)
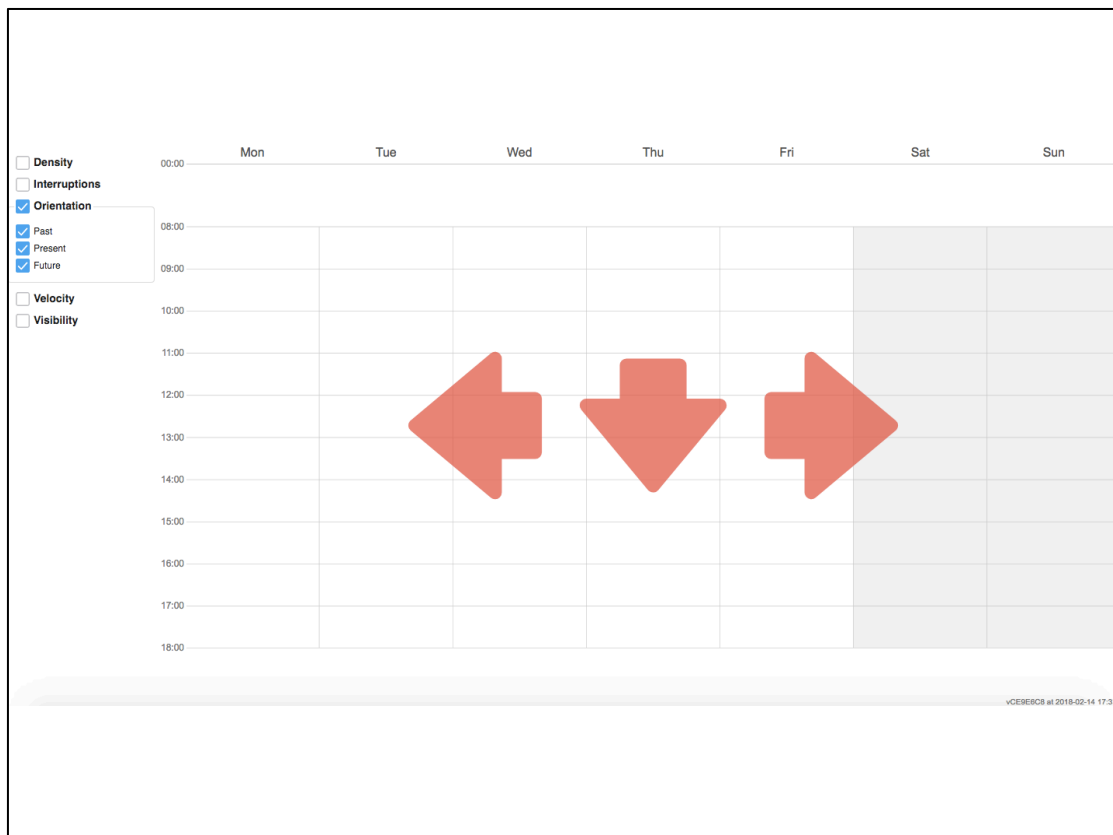
Figure 6-59 Preferred temporal orientation (cont.)
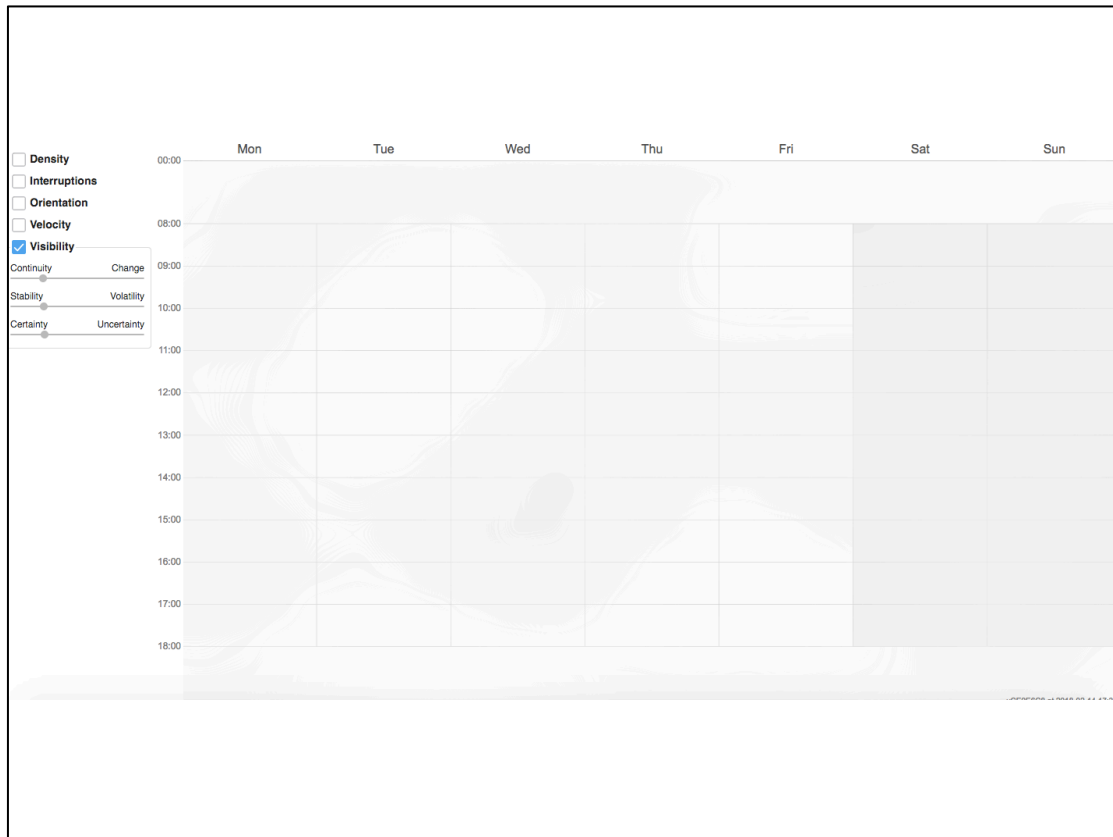
Figure 6-60 VUCA world – temporal 'fog'
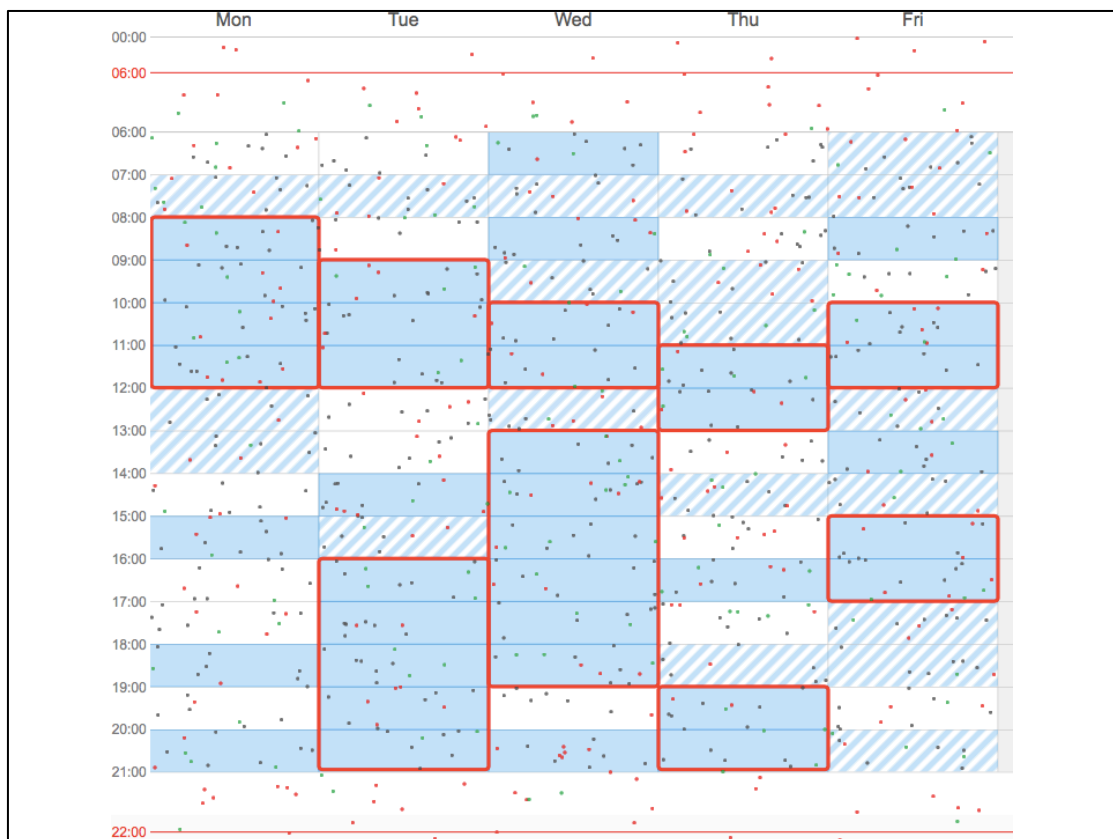
Figure 6-61 Combination of dimensions

Period 4:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams

PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaborative contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-62 Classification of Patterns in Period 4

Period 5:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams

PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaboraive contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-63   Transition to classification of Patterns in Period 5

6.4.7.1.　　　Tool Pilot Interviews

Purpose

By April 2018 a working version of the visualisation tool had been developed. The primary purpose of the 'Tool Pilot' interviews therefore was to test reactions to the tool, in particular how respondents made sense, if at all, of the various visual dimensions. I also wanted to gauge (almost six months after the programme) the extent to which the respondents were still committed to practising their change commitments.
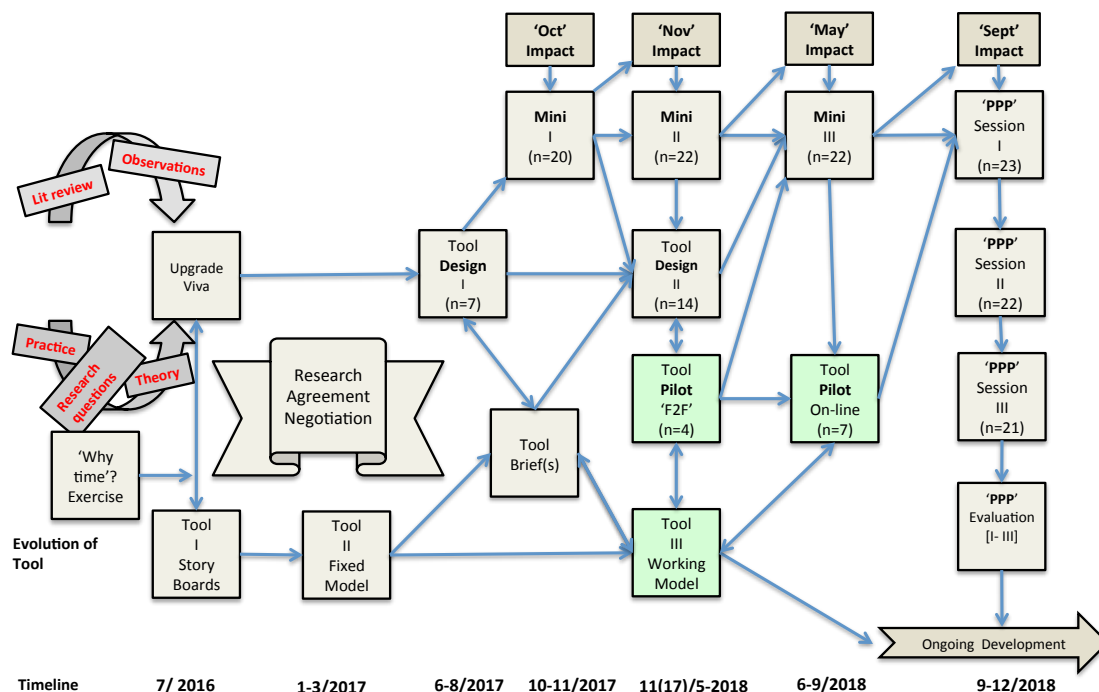
Figure 6-64 Locating Tool Pilot interviews in the research process

Between the 29th and the 30th April 2018, I spent two days at one of Forum's UK regional offices where I met four participants from the November programme – the total number of participants from the programme at this location (e.g. there were no exclusions).

Respondents were interviewed individually, face-to-face, in a meeting room at the office site. This meeting room was located on the side of one of the four open-plan work floors at the offices. Each interview lasted approximately one hour, was recorded and transcribed within 3 days of the visit. Observational notes and reflections were captured at the end of the visit. I had lunch with the four respondents together on Day I, met informally with a number of participants from prior *Impact* programmes and had three meetings with Forum managers, none of whom was a direct supervisor of any of the four interviewees.

The interview schedule

The interview was structured around a short series of questions (see Appendix G for a marked-up version of the interview guide). The logic of the short format was to build on the learning from the Tool Design interviews and create a degree of resonance with the respondent's context (e.g. keep the questioning short, relaxed and informal). To stay focused on the nature of the context I was entering (e.g. a busy office setting), I kept an image in my mind of the mountaintop and the swamp.

The Tool Pilot interviews were divided into four sections. The first section was devoted to an informal chat and catch-up with the respondent (5 minutes). After this I provided a high-level outline and overview of the session that included an update on how input from previous interviews had contributed to the development of the tool (10 minutes). To underscore the relaxed nature of the interaction there was no interview schedule on show.

After 10-15 minutes I started the demonstration of the tool on my laptop computer. In order to engage the respondents in this process, I unveiled each of the temporal dimensions by asking the respondent a question related to their experience of that dimension e.g. 'What proportion of your day is taken up with meetings?' 'How many emails do you send in a day?' This process of questioning lasted around 15 minutes.

On the first morning of my visit to the respondent's offices I made a quick pen drawing of Schön's setting. This crumpled image became my companion throughout the visit, and for the rest of the study. As part of my preparation before each interview I would focus on the image for a short period as a reminder of my positioning as a mountain top researcher in the interaction. The respondent's ontological understanding was potentially very different to my own and I had to be aware of this to facilitate credible enquiry.
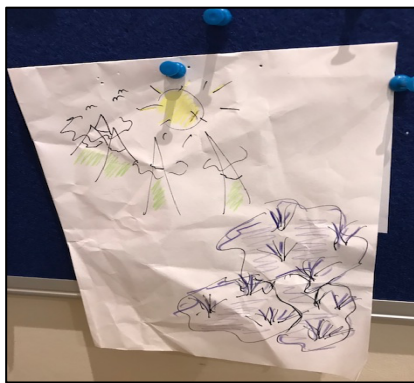
Figure 6-65 Pen drawing of the mountain top and the swamp

Once the five dimensions had been revealed, and a combined visual of all the respondent's preferences had appeared on the screen, I asked for their feedback on what they saw in front of them. This feedback question was framed in an intentionally disarming and frank manner ('I am interested in any thoughts about what you have seen. Please do not hold back…you will be doing me a huge favour by telling me exactly what you think). The subsequent discussion usually lasted around 20 minutes and involved a combination of general comments as well as the referencing and revisiting of specific dimensions. Aware that respondents would have a 'hard stop' at the end of the interview, I set the alarm on my phone to buzz 10 minutes before the end of the interview. I made them aware of this at the start of the meeting. This allowed time to ask a final open-ended question about anything that I had overlooked. An annotated Interview guide and a transcript from the face-to-face Pilot interviews is included in Appendix G and H.

Findings from Tool Pilot I

[1] Reaction to the tool

The initial reaction to the tool was positive from all 4 respondents – each made statements to suggest that the tool was realistic in its forms of representation and resonated with key aspects of their working lives. As the process unfolded the respondents appeared to have little difficulty answering the tool questions and were genuinely engaged as their temporal profile built up. None of the respondents had encountered a calendar-based approach before and they all commented favourably on the incorporation and impact of the non-linear temporal features (in particular the inclusion of interruptions as 'dots'). Two respondents made explicit references to the role the tool could play in challenging the assumptions they were currently making about their time use. One talked at length about his current temporal profile and how it was clearly at odds with how he needed to spend his time if he was to make a successful career transition. In a broader sense, it was noted by all four respondents that the tool could extend the aims and experience of the underlying *Impact* programme.

This is operationalizing of the course and how you set yourself up for success or failure and also whether you are creating the right time in the calendar

There was a range of feedback on specific design issues (colour, layout, font etc) over the course of the interviews. This was captured and integrated into the second version of the tool.

To what extent were respondents just being nice and trying to keep me happy by their responses? I sought to offset the potential for this by stressing the need for frank, open and honest feedback. After the first interview I refined my opening remarks to be blunt in my request for feedback ('You will be doing me no favours by just being nice) and took opportunities to stress this point over the course of the day (e.g. during lunch).

[2] The role of interruptions in the tool

The representation of interruptions in the tool as a combination of different coloured dots seemed to have the biggest impact on respondents. Two of the respondents insisted in revisiting this dimension to talk in great length (and with some passion) about the nature of multiple interruptions in their lives. The physical location of the interviews provided a helpful backdrop to this theme. Sitting with respondents in a glass meeting room close to their workstations, it was possible to see the open-plan design of the office and the potential implications this layout might have in terms of interaction and interruptions. Over the course of the four interviews a complex picture developed of the interconnected nature of interruptions and the subtle links these had with other temporal dimensions. I elaborate further on this within the discussion section.

The big thing that you have in the model is 'connections per hour'. I have nine people reporting to me. When you come into the office after a trip you have to have some form of engagement with all of them

For security reasons it was forbidden to take pictures in any of the Forum offices. Figure 6-66 below is similar to the design and layout of the floor as seen from the room during the interviews.
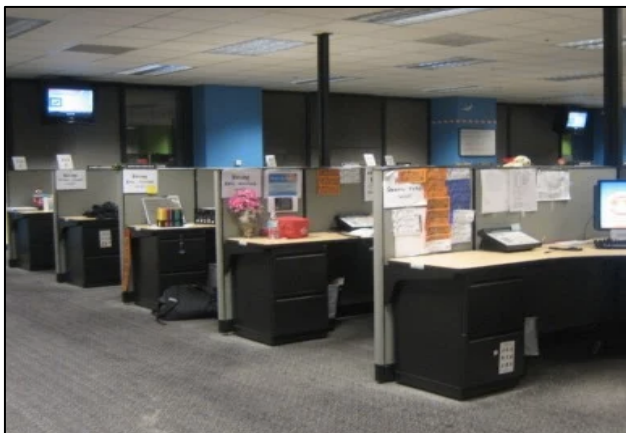
Figure 6-66 Similar open-plan layout to the Forum office

Source: Katy Warner via Flickr, CC-BY-SA 2.0

[3] Reaction to the tool - is that it?

While the initial reaction to the tool was positive, a less favourable reaction emerged as the conversations progressed. This reaction appeared to link the initial utility of the tool to the consequences of this action. It was pointed out by one participant that making the full extent of someone's time use 'viscerally' visible could be disempowering if that person felt overwhelmed by the information they received. Aligned with this, each of the respondents wanted to know what the next step was beyond the stand-alone use of the tool – in essence where was the practical advice and how could the 'tool' help them to do something different in their daily lives?

This (tool) is a great excuse for all of us to not do anything. Describing the reality is always something that resonates with people – you have understood me but you still have the 'so what?'

As part of this broader discussion about the tool it was noted by two respondents that the desire for any change in their working lives was not a solo act – any attempt at change had to be seen in the context of the multiple day-to-day interactions (e.g. meetings, calls, emails) that respondents had with others throughout Forum. For respondents these 'others' seemed to have a significant impact on the nature and intensity of their time use, which largely lay outside of their control.

I can make an attempt to do that myself but it also needs the buy-in of all those people who interact with me and if they are not going to respect that, or do something themselves – how is it going to work? What are the steps to managing the control?

[4] Intentionality versus doing

Three out of the four respondents stated that they had not worked on their commitments in any meaningful way in recent months. The fourth respondent, who had been highly motivated about realising a change in his role, was also having issues

with maintaining momentum. Two of the respondents graphically described how they found themselves 'in the weeds', drawn back to their old habits and balancing work priorities ('spinning plates') on a daily basis. The tool conversation seemed to represent a stimulus from an external source that provided a welcome reminder of their commitment.

Over the course of the first four months of the year, (I have) been overwhelmed by the number of tasks at hand, almost paralysed by the weight of too many things to do and…it is only when we have conversations like this that you reflect and step back and have a breath

Once again the theme of how respondents legitimately spent their time at work came across strongly. The power of this effect appeared to trump the idea of 'playing' or experimenting with any new forms of temporal practices. Under these circumstances change commitments, as new temporal practices, were often reduced to the realm of 'nice to have'.

I would not decline a meeting just because I have reserved some time in my calendar 'to think'. I just would not do that!

Discussion (Tool Pilot I)

The positive reaction to the tool from all four respondents was an encouraging sign. The novel approach to visualisation appeared to have an immediate impact and it was clear that the respondents could (literally) see the reality of their daily experiences reflected in the tool's diagrams, especially in the use of 'dots' for interruptions and distractions. This seemed to create an immediate connection that was considered useful by the respondents (Figure 6-67). The tool appeared to fill a gap in how respondents understood their temporal context - it was clear that interruptions were a core part of working life but their impact or implications were not captured in the format of a traditional diary.
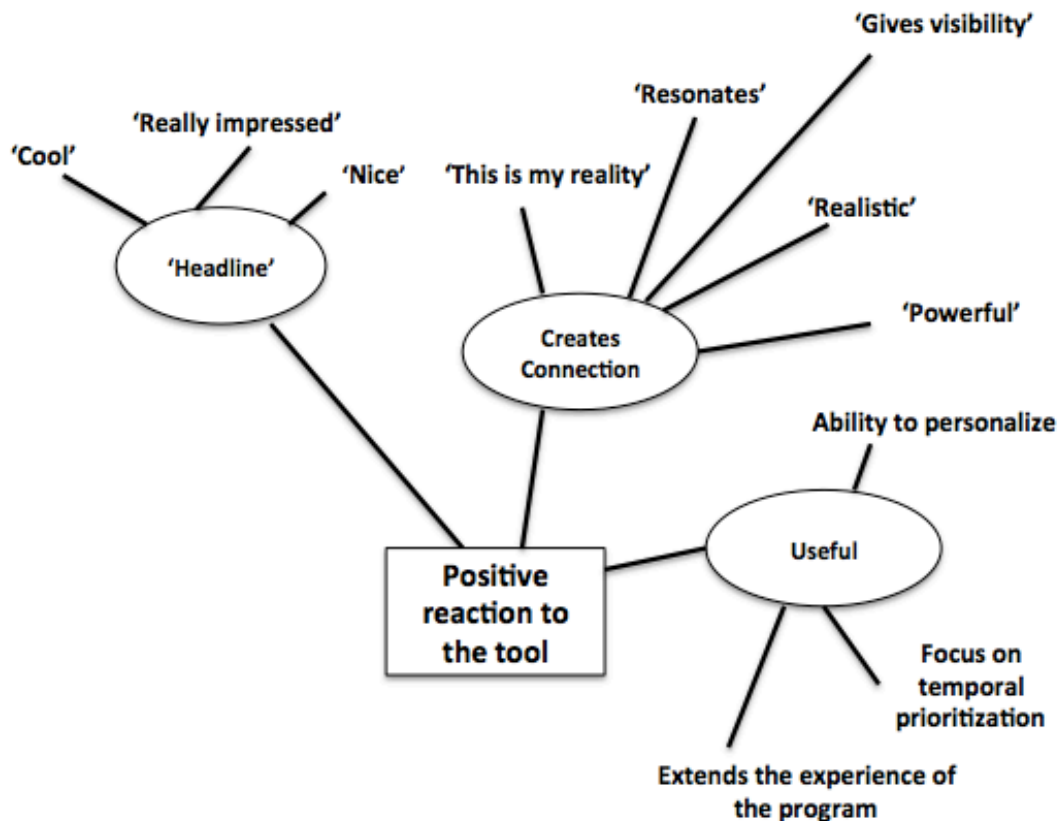
Figure 6-67 Thematic Map for positive reactions (Tool Pilot I)

The picture surrounding the role of interruptions became more complex over the course of the interviews. The dots on the visualisation screen appeared to give permission to respondents to talk about the different types of interruptions they experienced in their daily lives. While these interruptions had become apparent in the Tool Design interviews, they had done so on a stand-alone basis. My understanding of individual stand-alone interruptions, similar to that of the current literature (Newport, 2016), was focused on the impact that each individual interruption might have on attention and time use. It could now be seen how these individual interruptions appeared to work in combination having a potential effect that was more than the sum of their individual parts.
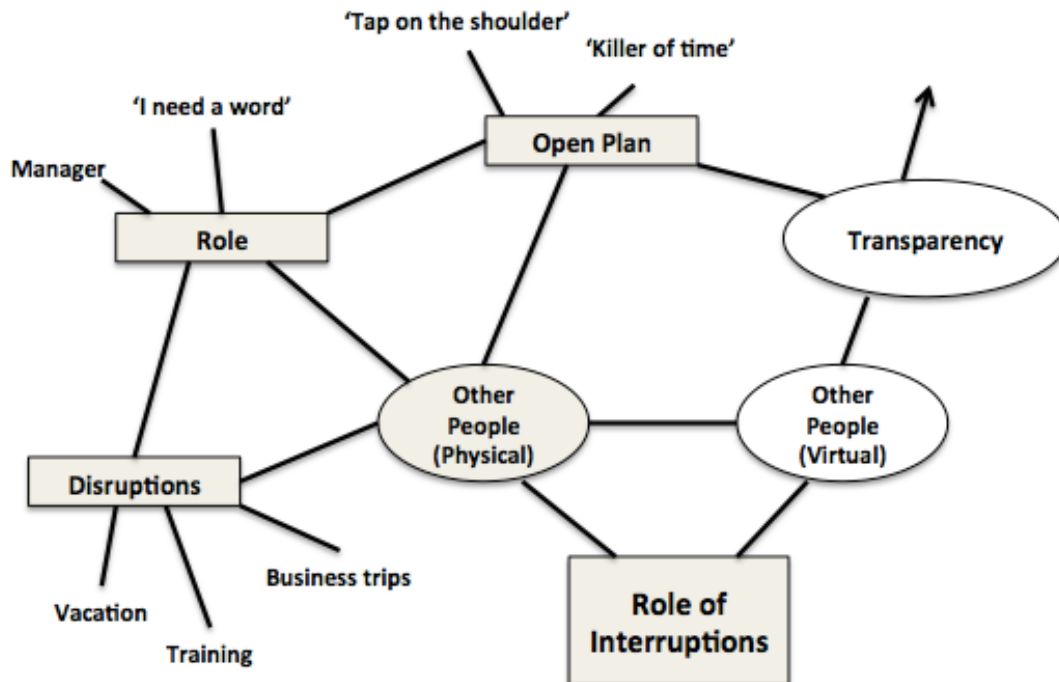
Figure 6-68 Thematic Map for the combined role of interruptions

This growing complexity of interruptions is best explained by way of example. By virtue of their emerging leadership roles, most of the respondents had direct reports that they managed on a day-to-day basis. The day-to-day acts of management would inevitably lead to interruptions in their daily activity ('I need a word boss'). In addition, the respondent was spending time out of the office e.g. longer temporal 'disruptions' such as a business trip or internal programme. This meant that the respondent inevitably had a backlog of work waiting for them when they returned to the office. It also meant that their direct reports would most likely have an even greater need to see them. Once the respondent was back in the office the physical layout of the work setting meant that there was no way for them to avoid these interruptions. As can be seen in Figure 6-67 each of these elements of interruption acted as an interruption in its own right but also acted together, in combination with the other interruptions. This combined effect, it would appear, has the potential to powerfully distract a respondent's attention. Why was this relevant for practising commitments? This combination effect had obvious implications for a respondent's time use and ultimately how they might ever find the time for their change commitment. The

commitment was being 'crowded-out' by the linear and non-linear time commitments.

The role of virtual interruptions added another dimension to this 'combination' effect. As previously highlighted it was not uncommon at Forum for an employee to 'ping' another employee with a request and then, almost immediately, physically come to their desk for an answer. The open plan nature of the office space made this form of 'temporal ambush' all the easier to accomplish. While this sounded like an extreme form of behaviour, I only became aware of my own complicity in, and use of, this form of interrupting during the analysis of this phase.

While working at Forum (e.g. leading a programme), I tended not to make an official appointment if I wanted to set up a meeting with someone. In the first instance I would ask one of my Forum colleagues to check the on-line status of the individual to see if they were around, physically or virtually. If they were out of the office I would ask my colleague to 'ping' them on instant messaging to ask them if they could get back to me. Assuming they were not out of the office I knew that I could then go, unannounced, to their workplace and see if they were available. This usually led to one of two scenarios. If the individual were free they would most likely have to see me. If they were in a meeting the transparent nature of the setting (e.g. glass meeting room) was such that they could be distracted during that meeting and know to get back to me.

Only on reflection did I realise how much this way of operating had become engrained in me over the years. As a semi-insider the use of interruptions had become so second nature to me that I took it for granted (Dwyer & Buckle, 2009). I realised that this approach had been introduced to me as far back as 2009 by the first programme manager I worked with at Forum - she had told me that this was the way *you got things done* at the company (Sun, 2008). At one level this acted as a form of triangulation for the findings re combined interruptions. More worryingly I had clearly internalised the behaviour to such a degree that these findings came as something of a revelation to me. I read this as a caution to myself. If I could not see

> this behaviour what else was I missing because of my semi-insider status? Once again, I will return to this question of assumptions in the final chapter.

The interactional expectations of others seemed to play an important part in the temporal practices of respondents. This appeared to be related to what these interactions said about how the individual was understood. As an example, every time a respondent received an Instant Messaging 'ping', or a meeting request, there was always a person behind this interaction with some form of expectation about an engagement with the respondent. This engagement was most likely a function of the respondent's current role, something that was socially understood within Forum. The individual receiving this request might have a deep desire to change but the *shadow* of these interruptions hung over this well-meaning commitment. This came out as a strong theme in the responses during this stage. All four respondents noted the role of these interactional expectations and their link to their current temporal practices. As Figure 6-69 notes the hidden role of others began to feel like a red thread that linked many of the responses.
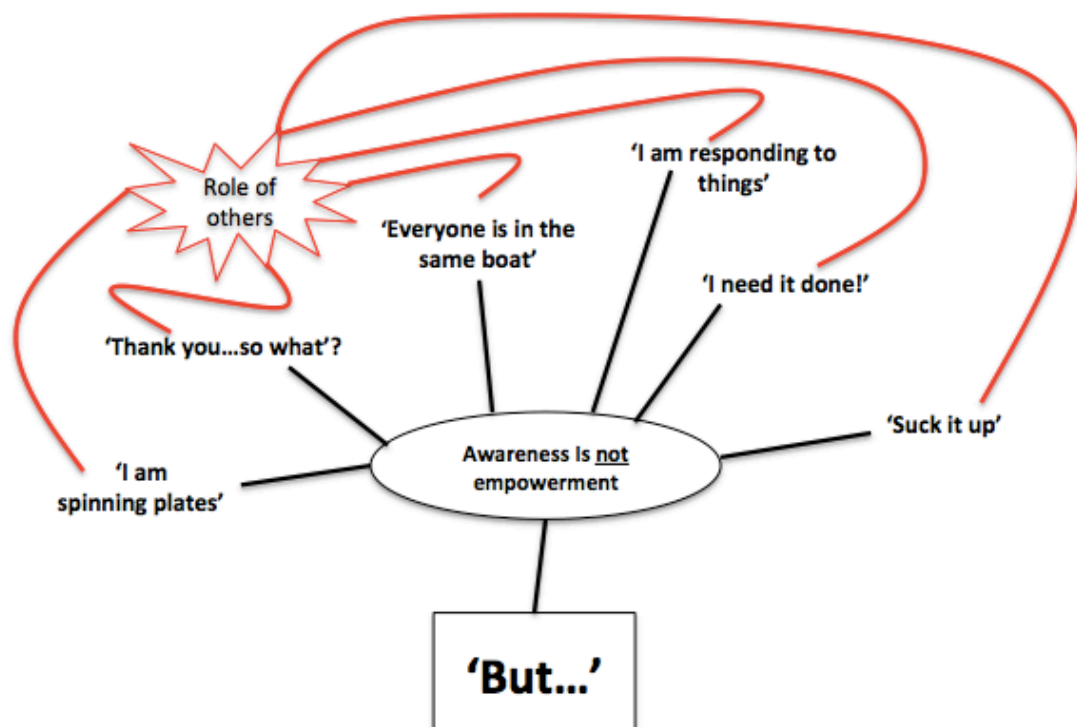
Figure 6-69 Thematic Map for the 'But' reactions, with the red thread of "others" (Tool Pilot)

There was no missing the 'but' that would inevitably follow the initial praise for the tool. These statements of reservation seemed to highlight the narrow line between a sense of empowerment and disempowerment vested in the visualization. In particular, it seemed that awareness of the full extent and impact of the temporal dimensions could easily give way to hopelessness if that awareness was not accompanied by a practical route to change. Whereas the 'what' of the visualisation was initially interesting to respondents they were eager for practical guidance as to 'how' they could use this information. This challenged my way of thinking about the tool. I had started the study believing that the inherent power of visualisation would be enough to prompt change. It felt increasingly that the visualization was not an end in itself but an enabler. The tool seemed to act as a platform for a wider temporal conversation around change.

Two strategic issues concerning the use of the tool arose during this period.

At the Registration Viva (July 2016) there was an assumption that the tool would be used primarily face-to-face with respondents. It was clear during these piloting interviews that this was unrealistic from a logistical perspective. I would not be able to hold face-to-face sessions with each respondent especially given the significant travel and cost implications that this would entail. More significantly the nature and location of *Impact* programme participants changed significantly over the course of 2017/18. Increasingly participants were drawn from the full range of Forum's businesses and as a consequence were based in multiple locations around the world. This changed the focus of the tool meaning that it had to 'work' primarily as an online tool. I needed to pilot the tool also in an online setting.

Tool Pilot Interviews II (on-line)

Purpose

A set of on-line interviews were arranged after the 'May' program (15th-18th May 2018). 10 participants were invited to individual interviews 28 days after the end of the programme – 7 participants accepted the invitation. Candidates were chosen on

a convenience basis having previously expressed goodwill towards the research. These criteria were judged to be important in order to maximize the potential attendance and to capture constructive, critical feedback on the tool. The primary purpose of the on-line interviews was to test the reactions to the tool using Forum's on-line communications tool.

The interviews were carried out using Forum's Voice Over the Internet Protocol (VOIP) system ('Skype for Business') allowing for simultaneous screen and audio sharing on a laptop computer. Each call was scheduled for 25 minutes and followed the same format as the face-to-face Pilot interviews. Interviews lasted 15 minutes (mean average) and ranged from 2 to 35 minutes. To avoid unnecessary distraction all notifications and alerts on the host computer were turned-off before the interviews. I followed the same process for recording, transcription and analysis as the face-to-face piloting interviews.
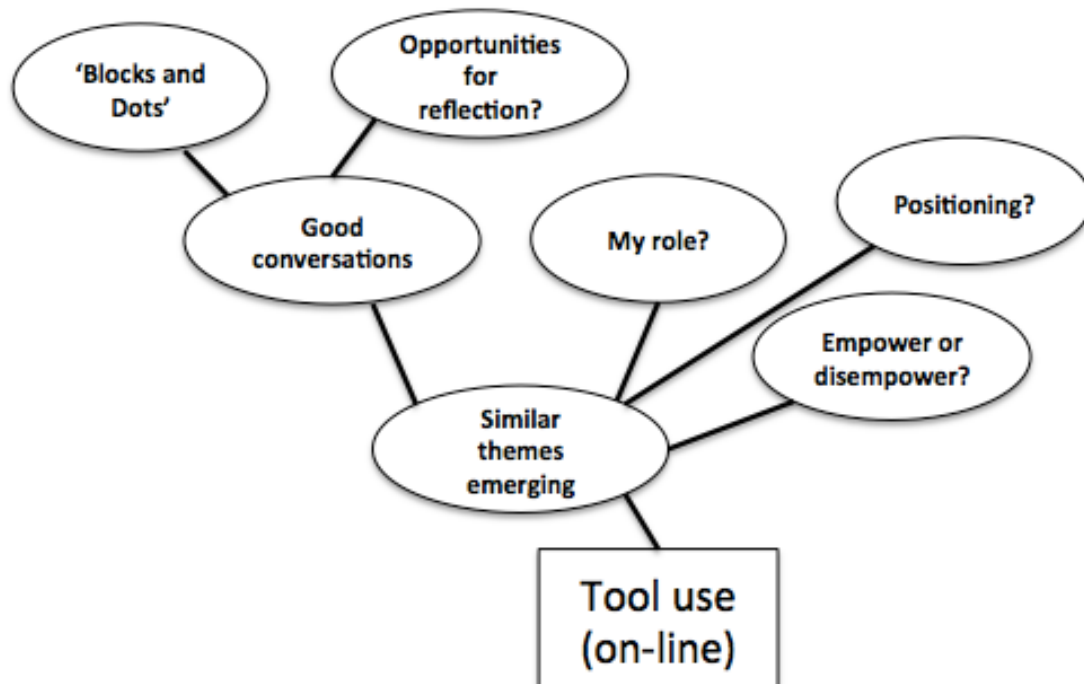
Figure 6-70 Thematic Map for on-line Tool Pilot interviews

From a content perspective there was very little that was new during the interviews. The responses (Figure 6-70) reinforced many of the themes highlighted to date, creating for the first time a sense of saturation in the topics and themes observed. In the limited time available with respondents (see below) the tool appeared to resonate, generate good conversations but also, once again, raise questions as to how it could be used more practically with respondents. Ultimately the most interesting finding from the on-line interviews had little to do with the 'what' of content and owed everything to the technical viability and usability of the tool.

There were significant technical problems across all the interviews. Each interview experienced some form of unforeseen interruption; in the end, five out of seven interviews were completed while two had to be abandoned. Ironically the technical issues were rarely related to the working of the tool but associated with Forum's VOIP communication technology ('Skype for business'). These problems usually related to version compatibility between regions or country specific firewalls (e.g. problems for a non-company employee accessing an internal communication network). In the three months following the on-line interviews (June- August 2018), I had nine separate meetings with members of Forum's operational and technology teams to find a way around these issues. A solution was eventually achieved in late August 2018. One overriding theme dominated my thinking at this stage. Developing the 'perfect' tool was useless if it could not be used. The 'how' of tool development seemed to matter as much, if not more, than the 'what'. This was a theme that combined a range of important strands and I will return to it during the use of the tool in Paper III.

It is hard to do justice to the effort involved in addressing the technical issues surrounding the on-line tool. The process required a significant investment of time, effort and relational capital to find a solution. Unfortunately, there was no other option - if the research was to continue this was a critical moment. My notes at the time did not sound optimistic. I felt I had made good progress in understanding the role of time after a programme – the first of my research questions – but was failing

on the second question e.g. constructing a usable tool. In July 2018 I considered abandoning the tool but ultimately decided to engage more broadly both inside and outside Forum to find a solution. This proved a successful strategy. My notes also indicated at this stage that I was somewhat weary with the sheer practicality of trying to do meaningful organisational research inside Forum. One comment I wrote seemed to sum this up – 'this activity is not for the faint-hearted'. I had faced significant issues surrounding formal access to Forum (documented in 6.5.5.1) yet now there seemed to be on-going, informal 'barriers' in various forms that made the process of access a live and mutating issue.

6.4.8.   **Period 6   'Use' (September 2018 – March 2019)**

The evaluation phase of the tool (the PPP) took place after the September 2018 *Impact* programme. This is covered in detail in Paper III.

During this period, I employed the version of the working tool seen in Period 5. I also used a range of materials (e.g. articles and visuals) that aimed to help respondents make sense of the visuals. **Figures 6-71 to 6-73** display a selection of these materials.

During this period the users of the tool were the ultimate 'end' users (e.g. respondents operating in the post programme workplace context). In seeking to facilitate the practising of change commitments, interpretation and social activities became dominant in the user Activities. As the interviews progressed the changing temporal profile of respondents [SA1] highlighted the need for sense-making [IA3] and set up the on-going discursive potential of the tool [SA2]. This supported the ultimate role of the tool as an elicitation process based around temporal practices (**See Figures 6.74 to 6.75**).

$$B = f (P, E)$$
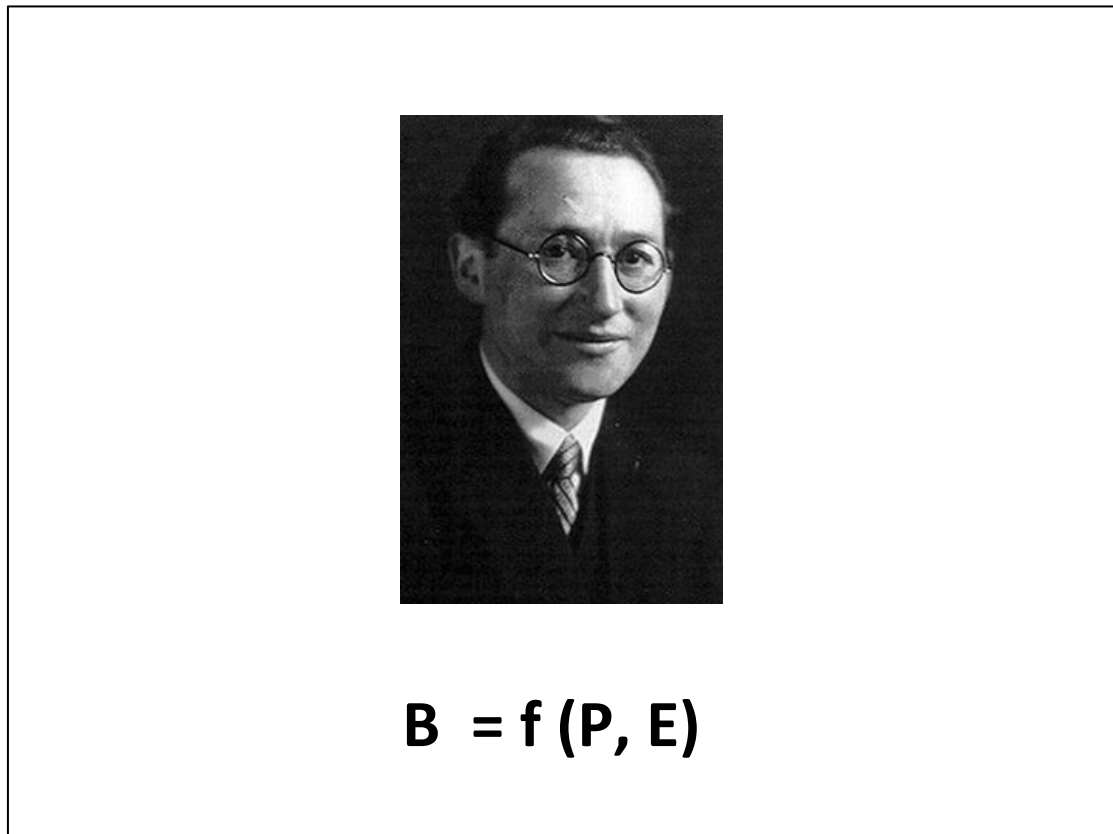
Figure 6-71 Sense-making visual (Lewin's context formula)
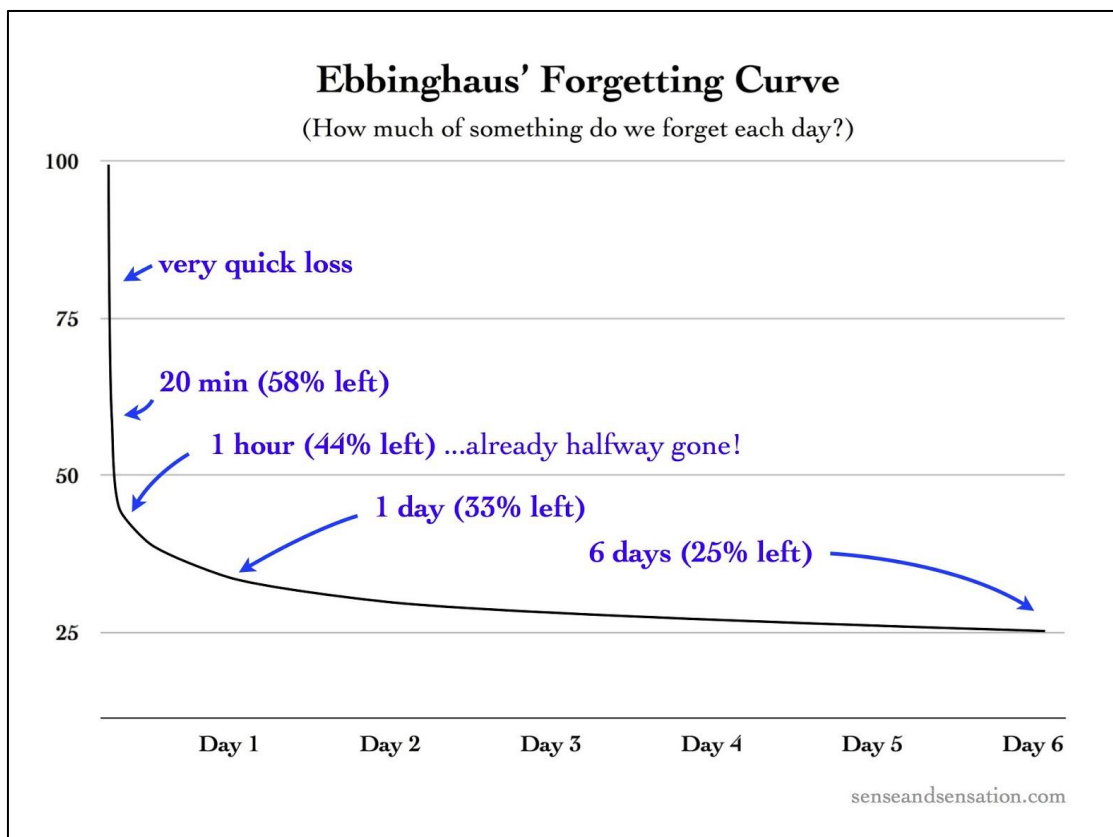
Figure 6-72 Sense-making visual (Ebbinghaus's forgetting curve)
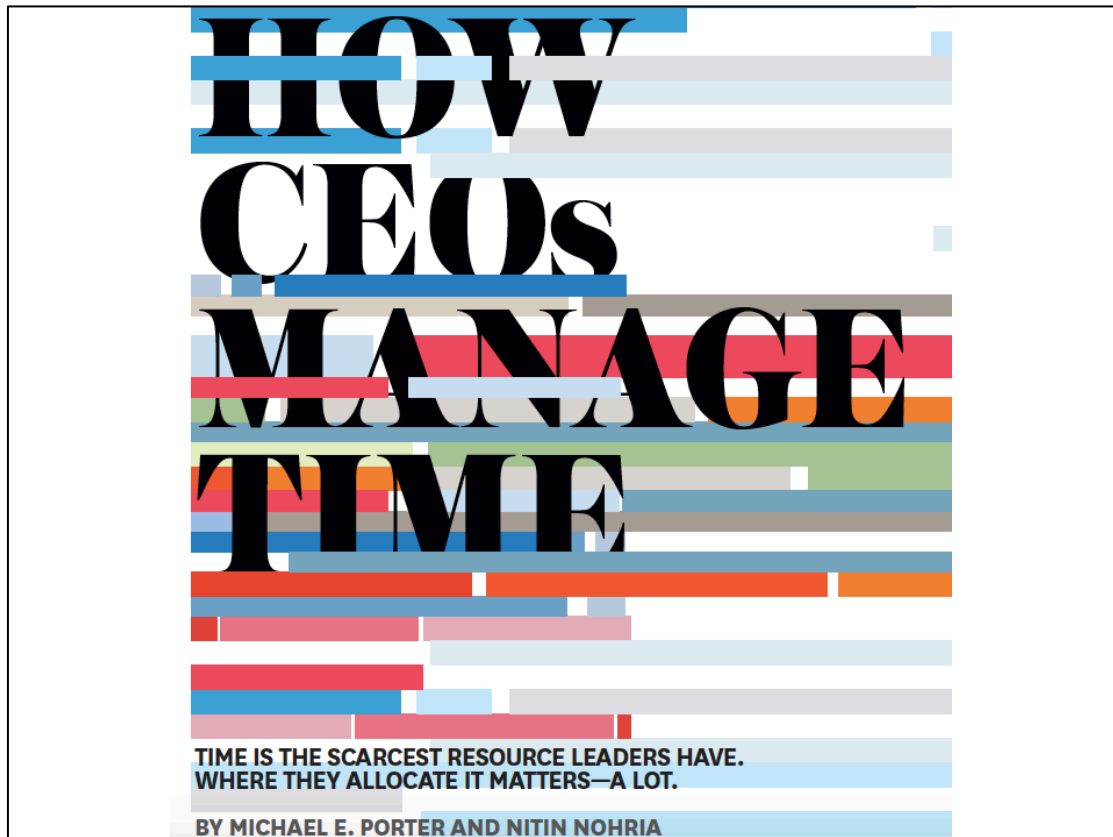
Figure 6-73 Sense-making visual (Porter and Nohria's CEO survey)

Period 5:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams

PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaboraive contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-74 Classification of Patterns in Period 5

Period 6:

PATTERNS OF ACTIVITIES describe the different types of activities that users are engaged in when they use diagrams

PATTERNS OF EXPERIENCE in use (that make up the preceding 3 profiles)

[1] Interpretation activities: reading Information Structures
This group of patterns describes the activities of diagram readers

IA1	Search	VE1, VE4, SE3, TE4
IA2	Comparison	VE5, SE4, ME4, TE2
IA3	Sense-Making	VE2, VE3, SE1, ME1, ME3, TE3, TE5

[1] Experiences of visibility

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

[4] Experiences of interaction

IE1	Interation opportunities are evident
IE2	Actions are fluid, not awkard
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

[2] Construction activities: building information structure
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation	IE1, PE6
CA2	Transcription	ME2, IE2, IE3, IE5, PE2, PE5
CA3	Modification	SE2, ME5, IE4, TE1, PE1, CE1
CA4	Exploratory design	TE5, PE3, PE4, CE2, CE3, CE4

[2] Experiences of structure

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a thing you know to something you don't
SE4	You can compare and contract different parts

[5] Experiences of thinking

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

[3] Social activities: sharing information structure
This group of patterns describes the activities of people who use diagrams in collaboraive contexts

SA1	Illustrate a story	VE2, VE4, IE6, TE1, CE3
SA2	Organise a discussion	ME5, IE2, TE2, PE3, PE4, CE4
SA3	Persuade an audience	VE3, SE4, ME2, ME6, IE5, TE3, TE5

[3] Experiences of meaning

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

[6] Experiences of process

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repitition can be automated
PE6	The content can be preserved

[7] Experience of creativity

CE1	You can extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Figure 6-75 Transition to classification of

6.4.8.1.   'Mini' interviews

Purpose of mini interviews

Over the course of the interviews I developed a feeling that something happened to respondents in the period immediately after returning to work. I suspected that respondents experienced some form of 'temporal shock' associated with the backlog of work that had accumulated while they were away, and that this had a disproportionate impact on practising. I wanted to see if there was some basis to this and constructed a series of mini interviews to investigate.

Figure 6-76 Locating 'mini' interviews in the research process

Two features appeared to be important in the design of these interviews. First, they needed to be carried out while the respondent was still experiencing this context, minimizing the potential for justification or sense-making after the event. Second, the interviews needed to take place after 'successful' programmes (Figure 6-76). Participants had to have left the *Impact* programmes with genuine intentions to apply

their commitment. As noted in Chapter Two, two scores were deemed particularly relevant to this measure - overall satisfaction with the programme and the individual commitment to apply learning in the workplace. Ultimately the purpose of the mini-interviews was to capture the visceral nature of the temporal experience for respondents in the immediate wake of a successful Impact programme and to try and quantify what this meant in terms of practising satisfaction.

An issue of recruitment

The first attempt at the interviews was not successful. I sent an email to all participants requesting an interview immediately after the October (2017) programme. This generated a response rate of just over 20%. While this response rate was low it was also clear that I was hearing from those participants that had a positive story to tell or were highly motivated to re-engage with me. This would skew my responses. If the process was to be valid I needed a way of re-connecting with as many people as possible from the *Impact* programme, most especially those who were struggling or facing challenges in practising their commitments.

For the second attempt I developed a 'mini-interview' approach. Two weeks after the end of the October programme I sent another email to all participants entitled '10 minute catch-up'. I was careful that the tone and content of this email stressed the minimal requirements associated with engaging in the interview. Aware that many meetings at Forum tended to 'round-off' to periods of 60, 30 or 15 minutes I deliberately chose 10 minutes for the length of the call hoping it would make respondents more willing to engage (e.g. 'I can afford to do this as it is not a 'real' time commitment). For those who did not respond to this email I planned a follow-up request for a 5-minute call. To minimise the potential impact of a known catch-up call on practising behaviour (e.g. 'I must practice my commitment as I know Barry will be calling me') no specific details of arrangements for the mini-interview were provided during the November and May programmes. A copy of the first and second e-mails sent to potential respondents can be seen in 6-77 below.

10 minute call?

Dear ███.

I hope all is well with you?

I was wondering if it might be possible to have a catch-up for **10 minutes** (…absolute maximum!) sometime over the next two weeks? I <u>promise</u> it will be no longer than that - I just have 3 questions to run by you.

Happy to flex to a time that works best for you.

Kind regards,

Barry

5 minute call?

Dear █████████.

Greetings from a rather overcast London. I am trying to catch-up with everyone ████████ and wondered if you might time for a very quick call sometime this week - I promise I just have 2 questions and will not hold you longer than **5 minutes**.

Kind regards,

Barry

Figure 6-77 e-mails for 10 minute and 5 minute calls

In total, three sets of mini-interviews – 63 interviews in total – took place after the 'October' (2017), 'November' (2017) and 'May' (2018) programs (See Figure 6-76).

- The 'October' programme ended on Friday 6th October 2017. Mini-interview requests were sent out 14 days after the end of the programme (20th October). 20 out of the 23 participants (87%) responded with interviews taking place between 14 and 48 days after the program (23 days mean average).

- The 'November' programme ended on Friday 17th November 2017. The mini-interview request was sent on 2nd December, 16 days after the end of the programme. 22 out of the 23 programme participants (96%) responded, with the interviews taking place on average 23 days (mean average) after the programme (representing a range of 17 to 27 days).

- Finally, the 'May' programme ended on Friday 18th May 2018. The mini-interview request was sent 12 days afterwards (30st May). 22 out of the 24 program

participants (92%) responded with the interviews taking place between 12 to 41 days afterwards, a mean average of 25 days.

All interviews were carried out by phone, recorded and transcribed (personally) within 48 hours.

The changing interview design

The interviews were structured around <u>two</u> questions. First, a request to describe the experience of returning to work after the programme and second, a quantitative estimate of the respondent's satisfaction level with practising their change commitment after the programme. A marked-up interview guide for the November mini-interviews is included in Appendix I. This schedule included the four questions as well as directions concerning my tone, intonation, emphasis and speed of delivery throughout the call. A transcript from the November mini-interviews is included in Appendix J and the initial coding schedule in Appendix K. The chronology of my reflective notes for the October mini-interviews can be found in Appendix L.

In an attempt to create a relaxed and informal connection with the respondents, I divided the interview into three sections.

'Catch-up' (3-4 minutes): The first section sought to maintain the character of interaction that had defined exchanges on *Impact* and therefore create conditions conducive to honest and frank exchange. During the majority of the interviews these initial conversations usually lasted for 4-5 minutes and reduced the effective length of the core interview to just over 5 minutes.

'Question I' (4 minutes): The initial catch-up was followed by a request to the respondent to remind me of their commitment. After this I asked the respondent to give me some words to describe what it was like returning to work after the programme.

"Question II' (2 minutes): The second key question concerning practising satisfaction was asked in the final section. This integrity of the responses to this question could be seen in the light of the prior qualitative feedback.

The interviews compared the score for post-programme satisfaction (with practising) with the commitment to practise score captured at the end of the *Impact* programme. These scores do not measure like with like so it is reasonable to ask if this represents a valid comparison. I adopted the following logic in making the comparison.

The commitment score at the end of the *Impact* programme sought to capture a measure of intentionality (to practise) at a point in time. The timing of this measure was particularly relevant as capturing a commitment score at the very end of the programme represented, arguably, the high point of the programme experience. Capturing another score for commitment after the programme did not seem reasonable as it was likely to generate an over-positive response from those that had made little progress with practising ('I have not done anything, but I will'). Also, given the high levels of the original commitment scores – triangulated by overall programme satisfaction scores and positive qualitative comments - it seemed reasonable to suggest that these initial scores represented an authentic measure of aspirations at the end of *Impact* (e.g. if these scores had been lower it could be argued that subsequent satisfaction scores might be lower because participants has a low assessment of the programme's worth or were not interested in application). The scores were high for all three programmes so it seemed valid to make the comparison between original commitment to practise and ultimate satisfaction with practising.

Findings from the mini interviews

Information about a respondent's relationship with time was often provided ahead of the interviews. 30% of respondents provided unsolicited, naturalistic 'temporal data' ahead of the calls. This usually occurred in the reply to the initial interview

request or during section I of the interview. Figure 6-78 displays a range of comments from nine respondents to the November interview requests. While each of these had indicated that they were eager to participate in the interviews when they were <u>on</u> the programme, this situation appeared to change once they were back at work. Two follow up emails were needed in each set of mini-interviews to achieve contact with over 90% of the original programme participants.

There were frequent indications from respondents that the process of 'finding time' to engage in the catch-ups was a challenge. Many of the interviews were squeezed around other activities that the respondent was simultaneously engaged in - business travel, a client outing, transit to a customer meeting or a personal, weekend activity. A number of respondents arrived late for their calls and then had to leave almost immediately after the scheduled 10 minutes (to join another call or meeting). Despite the deliberately short duration of the calls respondents still clearly struggled to make time for the interviews.

After the initial catch-up, respondents were asked if they would remind me of their change commitment. If a respondent could not recall their commitment then it seemed reasonable to assume that they had not done anything with that commitment since returning to work. The majority of participants (>85%) were able to restate a credible version of their commitment. During this initial encounter it was clear that many respondents continued to appreciate key aspects of *Impact* and frequently made positive and supportive comments about the programme. A number of the respondents had recommended the programme to colleagues and had given positive feedback to their managers and supervisors.

[1] Hi Barry. Apologies for my delayed response…I returned back ███████████ ████████████████████████████ which we conducted last week. I have some time this week to connect. I am available Thursday or Friday to connect with you. What time would you like to speak?

[2] Barry, I can do 8:30 a.m. ███████████ on this Wednesday – Dec. 6 or Friday – Dec. 8t at 9.00 a.m. ███████████. My morning time next week is very bad but if you can do a bit late, we can look into next week as well

[3] Hi Barry. Happy to chat. My calendar is totally booked this week however I have some time next week. I'm fairly wide open next Tuesday from 7:00 – 11:00 am ███████████. Would a slot sometime in that window work for you?

[4] Sorry Barry I jumped the gun on this. Could we make it the same time but Thursday. I have an appointment ████████████████████ at this time.

[5] Apologies for not responding earlier; I got caught up in a whirlwind of work, travel and a bug that kept me down for a few days. I would be delighted to catch-up with you on your research. I'm travelling until Wednesday next week, but the week of 11 December should work fine, if that suits.

[6] All is good thanks. Slowly getting back on top of things at work as when I can back from ██████████ I was straight into another course. Coincidental timing and great learning but a massive knock on in email/work terms. I think a few hours catch up this weekend and I will get on top of things. I hope you are keeping well too?

[7] Hi Barry, Apologies for the delay in responding.I have traveling most of this week. Would next Thursday (14th) morning Uk time work for you?

[8] Hi Barry - let me see if I can help?███████ is doing the amazing job in protecting me and trying to manage my agenda

[9] Apologies for the delay. Had a week's leave after the course and as soon as I hit the inbox when I got back to work, totally swarmed.

Figure 6-78 Email responses to the mini-interview request (November)

Respondents were then asked the first of the two core questions - to provide some words to describe what it was like to return to work after *Impact*. Across the interviews this question generated a lively response from respondents. Many of the words and phrases used seemed to tap deep, visceral feelings that were frequently laden with references to time.

I came back to the office and the s**t storm started. It was terrible

Over 35% of the respondents did not return immediately to the office after the programme. A range of 'disruptions' were cited including sickness, holiday, other learning programmes and business trips. Alongside this, respondents did not appear to stay long in the office on their return – many seemed to have other reasons to be out of the office (e.g. client visits) within the first two weeks of their return.

So, since I have been back from the course I have been almost every week on the plane, traveling as well which doesn't particularly help

In the closing section of the interview respondents were asked how satisfied they were with their ability to practise their commitment since leaving Impact. This was presented as a sliding scale from 1-5 with 1 as very dissatisfied and 5, very satisfied. The average score was reported as 2.77 (October), 2.95 (November) and 2.83 (March). These compare to a commitment-to-apply score for the October programme at 4.87, November 4.7 and May 4.82.

Discussion of the mini interviews

Measuring respondents' satisfaction with practising in the immediate wake of the programmes painted an arresting picture of the immediate post-programme context. In just over 20 days following the end of *Impact* the difference between the programme commitment score and the post-programme satisfaction scores dropped by approximately 2 points. This was the case for all three programmes. The drop in scores appeared to suggest that previously motivated programme participants experienced some form of 'shock' once they returned to the workplace. In one sense this description is not a surprise - many of us will have experienced something similar as we come back to work from a holiday or even a long weekend. This brought me back to the discussion of substance ontology in Chapter Three. Seeing individuals as disembodied and static substances clearly relegated the role of context in these settings (McLaren & Durepos, 2019). The mini-interviews appeared to tell a different story – here the immediate temporal context of the respondent appeared to be an

active ingredient in their relationship with their change commitment. In particular these commitments appeared to get crowded-out out by other temporal pressures as soon as the respondent was back at work. This was evident in the unsolicited references to time ahead of the interviews and the extent to which interviews were squeezed in around other commitments. One way of explaining this might be that the interviews did not matter to the participants. Once again the high level of stated intentionality at the end of *Impact*, and the general satisfaction scores would suggest that that was not the case.

The experience of 'shock' also said something about the type of support that was needed in the immediate post-programme context. As noted at the end of Paper I, traditional coaching interventions tend to focus on the substantive individual, but in so doing, potentially miss out on the significance of the individual's context. Temporality in this context, as evident from the interviews, was viscerally experienced and it would appear reasonable to reflect this in the nature of support provided.

The challenges of recruiting participants for the interviews convinced me that the period between the Impact programme and the subsequent use of the tool needed to be actively managed if the tool was to be successful. This period was a legitimate part of a respondent's temporal experience and had to be captured in the tool's methodology and approach. This experience also raised the possibility that these initial periods were not the only temporal phases or stages after a programme. As discussed in Chapter Four, this observation challenges the core linear assumption that each moment of time after a programme is equal and experienced in the same way. I will return to this further in the final chapter.

The interviews appeared to highlight a distinction between the (conscious) awareness of a change commitment and the ability of the respondent to do something with that commitment in the workplace. The majority of respondents found it easy to remember what it was they had committed to at the end of the *Impact* programme but then gave multiple reasons as to what they actually did, or in most cases, did not

do with that commitment. This seemed to support Mead's notion of fuzzy determinism (Ragin, 2008), with context and agency being somehow wrapped up in our understanding of time (Flaherty & Fine, 2001). It also seemed to suggest a distinction between the type of knowledge that was produced at the end of the *Impact* programme and what was subsequently useful in the workplace.   This appeared to support the idea that knowledge needed to be actively recontextualized in some way if it was to be fit and relevant in the post-programme temporal setting (Evans et al., 2010).

In a recurring theme of the various forms of data capture the structure and tone of the mini-interviews (the 'how') felt almost as important as their content (the 'what'). This suggested once again that the mode and process of enquiry needed to feel ontologically valid to the respondent if they were to authentically engage with the process.   This issue lay behind the challenges with the semi-structured interview schedule, something that appeared to create an ontological divide with respondents. It also manifested itself in how I showed up as a researcher - wearing my academic 'hat' lightly appeared to be important in connecting with the world as it was understood by the respondent.   This was relevant for the use of the tool. The design of the tool, in terms of pre-engagement and engagement, needed to match the temporal ontology of the 'swamp' - the experience of engaging with the tool needed to feel valid for the respondent.

In the thematic map for the mini-interviews (Figure 6-79), the themes of time and tool move up the page to acknowledge the presence of factors that precede the use of the tool. This positions a level of pre-engagement that involves the *Impact* programme as well as the period before the first use of the tool (e.g. the swamp). The post-programme satisfaction scores are captured as an explosive, red temporal shock with a range of nodes that flow into, and are related to, this experience. The ability to ultimately connect authentically with respondents is captured via an ontologically sensitive form of enquiry that aims to be fit for the nature of the respondent's context.
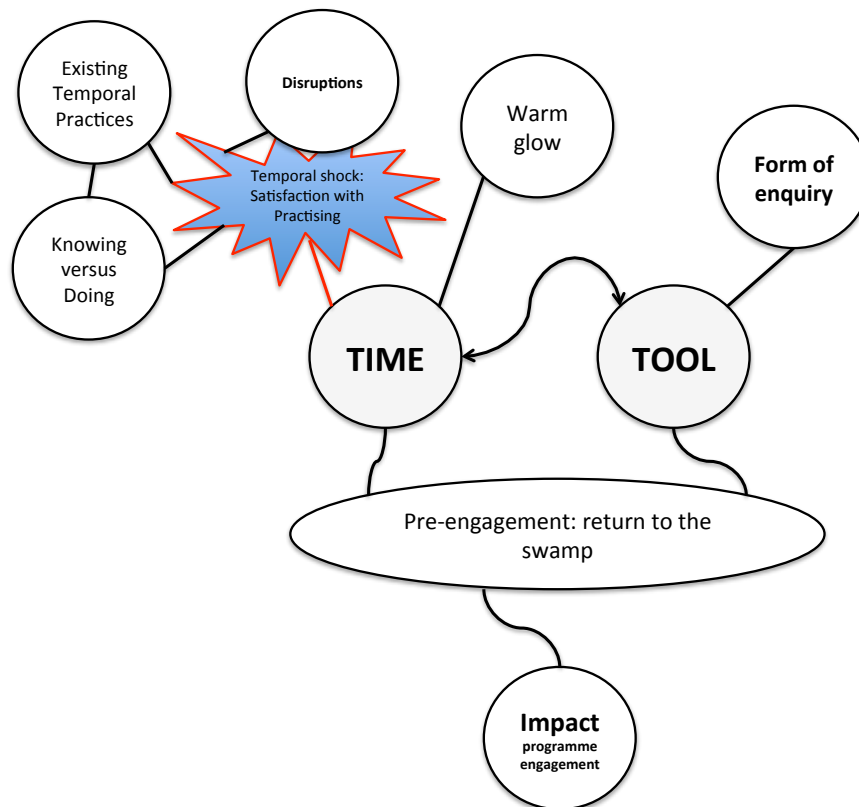
Figure 6-79 Thematic map for the mini interviews

6.4.8.2. 'Temporal shock': satisfaction with practising over time

The November *Impact* programme provided an opportunity for three data points of practising satisfaction over a six-month period (Figure 6-79). The mini-interviews provided a score after 23 days, the Design interviews after 91 days and the Pilot interviews after 164 days.

The mini-interviews in November captured satisfaction scores from 22 respondents – this represented 96% of the original programme participants. During the mini-interviews all but one of the interviewees expressed a willingness to continue their participation in the study at a later date. Despite this, 8 out of the 22 participants did not reply to three requests for a further interview at the 91-day point. Of the 14 respondents that took part in the interviews, 4 gave a formal satisfaction score for practising while the remainder (10) were estimated on the basis of their qualitative

interview feedback. On this basis nine respondents were estimated to have declined by one point while five remained at their mini-interview score. This generated a practising satisfaction score at the 91-day point of 2.5.
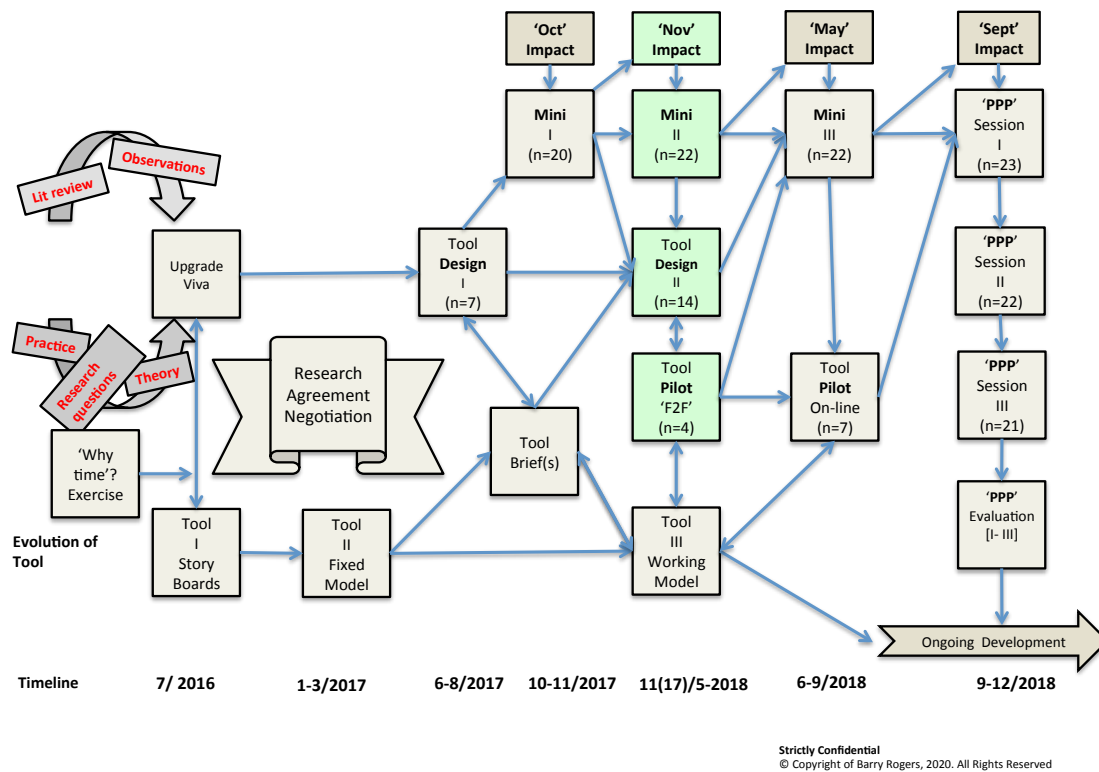
Figure 6-80 Three data points after November Impact Programme

An estimate was made for the satisfaction scores of the four face-to-face interviews at 164 days. One respondent, overtaken by concerns about a new job freely admitted during the interviews that he had put his commitment on permanent 'hold' – this person was rated zero. Two of the other respondents had made promises about core aspects of their commitments but still had not done anything; these were each given a score of one. The final respondent continued to make progress but noted increasing challenges maintaining momentum. This person was rated 3.5 (down from 4 in the mini-interview). This generated a score of 1.37 at the 164 day point.

There were some significant limitations associated with the construction of this curve. The majority of scores at the 91-day point, and all at the 164-day point represented estimates. While these estimates were based on detailed feedback, as well as specific references to practising behaviour, they did not capture explicit scores from respondents. Against this, no estimates were attributed to those who chose not to take place in the interviews. Arguably the lack of responses from eight respondents after 91 days might suggest implied misgivings with their practising satisfaction, and led to a lower score. It is also worth noting that scores for the mini interviews were based on self-reports so these were open to over-estimation bias. In two cases, where the mini-interview estimate provided was significantly at odds with the nature of the qualitative feedback, each score was reduced by one point.
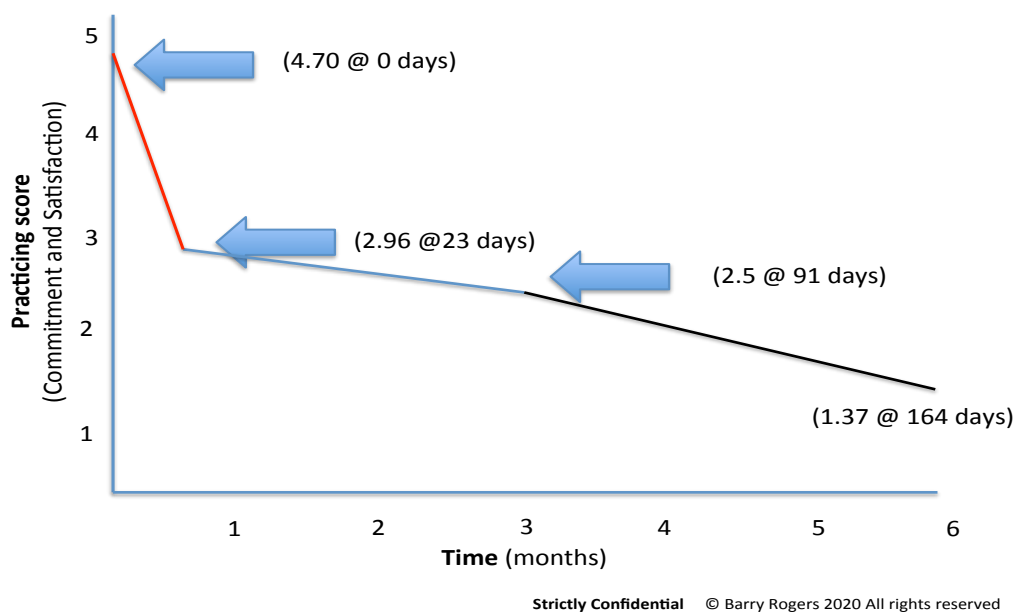
Figure 6-81 Satisfaction 'curve' after November Impact programme

The three data points provided a crude, but compelling, assessment of practising satisfaction over time (see Figure 6-81). The shape of the curve bore a striking resemblance to the Ebbinghaus forgetting curve (Murre & Dros, 2015), with a steep initial decline and a flattening out after a three month period. This would seem to imply that the period immediately after a programme is a point of particular vulnerability in relation to the practising of commitments. It also raised a question in

my mind as to the existence of other temporal stages after this period and how they related to practising. I will return to this point in Paper III.

Before Finishing this Paper I would like to briefly highlight some reflections associated with the process of tool development.

6.5.   Section 5: Discussion

6.5.1.   Multiple users, functions and purposes of the tool

The development of the tool appeared to underscore the rich links between process and time. This final tool was not some magical event that fell full-baked from the sky - it evolved and unfolded over time. Incorporating time and process into the analysis highlighted how the temporal features were more than an undifferentiated, linear background concept. The route to the 'final' tool represented an iterative, interactive process that cycled through a number of distinct periods. Six periods in particular appeared to develop quite naturally around distinct representations of the eventual artefact. The process of post-hoc analysis helped in identifying this temporal periodization – in effect the periods only became fully visible through a process of retrospective sense-making (Weick, 1995) that allowed multiple forms of functionality to be observed.

Incorporating the process of development with *Pattern* analysis complicated the notion that the tool had a single, fixed purpose; specifically, it highlighted how diagrammatic activities changed as the tool evolved and came to be seen through the lens of different users. Consistent with the overall aim of the study the tool had a stated purpose; this was articulated at the start of this paper. What became clear over the course of tool development however was that the tool did not just have one purpose - it had diverse, multiple purposes at different periods of the design process. In each of the periods the purpose of the diagrams/tool was determined by the way that the relevant user(s) at that time interacted with them. As an example, during the

Registration Viva in Period 2 the users of the tool were the examiners of my study who had a specific set of needs at that moment. This was very different to requirements of the designer in Period 4 or the ultimate Forum users in Period 5 and 6. These users, with differing expectations and needs, became visible through the use of the Patterns as an analytic framework. This notion of different functionality and needs had practical significance. Awareness of multiple purposes of the tool was particularly useful in highlighting the role of gatekeepers in the research process. As the study continued I became more aware that different users saw the tool in different ways and stopped seeing the end user (the respondent) as 'the (sole) user'.

6.5.2.   A practical theory of design

The *Patterns* highlighted the importance of a practical theory of diagrams. As a non-professional designer the design journey presented a range of options where decisions had to be taken that shaped the eventual tool. Recognition that these decisions inevitably involved trade-off was reassuring. The process of data capture and analysis forced me to step back and see what worked/did not work in terms of the final user experience. The *Patterns* gave me a way of making sense of user reactions, and how these reactions could be labelled and understood more broadly in visual terms. This supported the process of deliberate visual design choices throughout the course of the interviews, which in parallel could be fed back to the tool designer through the tool briefs. An example of this came during Period 5 of the design when the decision was made to shift from a face-to-face to an online tool. This shift encountered significant technical issues and brought clarity to the ultimate need for 'simplicity' and 'impact' from the tool. The clarity occurred by returning to the *Patterns* to see what made sense in terms of design direction and choices. As a non-professional designer I would have struggled without a practical, and usable reference theory.

6.5.3.   Pre-engagement with the tool

As helpful as the *Patterns* were in the process of design, they appeared to miss out on one key dimension of the relationship with diagrams, what I came to describe as 'bringing the horse to water'. This raised a distinction between attracting respondents to the tool and those respondents actually using the tool. The list of Activities and user Experiences highlighted by the framework are built around an implicit assumption that there are no issues with recruitment to the process of engagement with the diagrams. The evidence from the interviews appeared to suggest that this is unrealistic. Pre-engagement and engagement with the tool would appear to be two sides of the same coin. This lead to a realisation that I as a designer could create the most wonderful set of diagrams for the tool but there was little use in doing this if I did not actively manage the respondents pre-engagement with the tool. If no respondents turned up to use the tool, it might have great theoretical validity but it was a practical failure.

This was where sensitivity to the meta-aspects of ontological designing (Willis, 2006) within the framework (see Figure 6-5) was useful. This guidance kept a degree of focus on the realistic ontological features of the world of final users. It also reinforced that I was not solely designing a tool but also a process that involved pre-tool engagement.

6.5.4. Relational tensions in the process of recontextualisation

The realities of navigating the perspectives unearthed by interdisciplinary collaboration in this study were challenging. This was particularly evident during the collaborative elements of tool design. I repeatedly fell into the trap of seeing the study, the tool and the overall design process solely from my perspective. There were numerous instances where I made assumptions about what my design colleague ('the designer') knew about the study, its purpose and logic. Given my closeness to the study I mistakenly assumed that he would share my levels of enthusiasm - this miscalculation was often compounded by differences in personality type and preferences. Ultimately it felt as if we were engaged in different language 'games' (Wittgenstein, 1973), languages whose rules reflected a wider set of values,

dispositions and orientations within our respective communities and contexts (Astley & Zammuto, 1992). If the process of design was to be sustained, and ultimately successful, we needed to find common ground, a mediated position that actively recontextualised the dispositions (as reflected in language) of either of our communities (Allan et al., 2018). This brought me back to the lessons of the 'mountain-top' (Schon, 1984). If the collaborative design process was to 'work' I needed to recognise, and navigate, the processes of recontextualisation in order to produce new knowledge that made sense to both sides.

At the end of the first meeting with the tool designer I summed up the session by giving an overview of the study. As I did this I included what I believed to be the requirements of the design and finished by asking the designer if what I had outlined had made sense. He said it didn't. I was somewhat thrown by this response. In my mind I had made a very deliberate effort to be clear and precise about the study as well as my needs for the tool design. This comment however was only the opening shot in a challenging set of on-going interactions with the designer. Often I found myself not understanding his approach, terminology or requests. He needed to know very minor, explicit details about how the tool should look and what sort of functionality it needed to work. On many occasions this level of detail was not something I had considered. Eventually he requested a series of design briefs, the earliest of which were rejected as lacking the necessary specificity and detail.

The mini interviews marked the end of the development of the tool. While it continued to be refined over the coming months these changes were not material and the basic ingredients of the tool, and its approach to enquiry, were in place. The tool was now ready to be used and evaluated, and its output explored, after an *Impact* programme. This next stage of the study is taken up in Paper III.

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6.7.   Appendices

Appendix A :   Participant Information Sheet

'Doing what we say we will do – the role of time in the delivery of commitments after

formal learning interventions'

Before you decide to take part in this study it is important to understand why the research is being done and what it will involve. Please read the following information carefully and take time to decide whether or not you wish to take part. The Researcher (Barry Rogers) can be contacted at any stage if there is anything that is not clear or if you would like more information.

Purpose of the Study

Many of us know the feeling of leaving a *successful* training program full of commitments to practise new learning and actions. Often however these commitments do not stand *the test of time*. We find ourselves sucked back into the action, traction and distraction of everyday working life. In such circumstances we often revert to type and our commitments evaporate. The current research seeks to address this issue.

This study explores the role of time in practising learning commitments after a customised executive education program. The output from the study involves the development of a visual coaching tool to facilitate the practising and delivery of learning commitments. The study will also explore the pedagogic (e.g. programme design) implications of the tool.

This is a mixed-methods action research project that forms part of doctoral research by Barry Rogers at the Faculty of Education, University of Cambridge. It is underpinned by a signed research agreement with ███████████████████████████████████████.

Why have I been chosen?

Prior to the official launch of the study in October 2017 Barry Rogers is conducting a number of pilot interviews (circa 10) with a sample of the commercial ████████████████ ████. This sample has been selected on a convenience basis.

Do I have to take part?

Taking part in this study is entirely voluntary. Refusal to participate, or withdrawal from the study will involve no penalty or loss, now or at any time in the future.

What do I have to do?

The first part of the study involves a telephone interview that will last approximately 30 minutes. The interview explores the nature and dynamics of your temporal setting e.g. how you use your time on a day-to-day basis.

If you decide to proceed to the second stage of the study this will involve two face-to-face sessions. The aim of these sessions is to explore the implications of your interview data in the form of a visual tool – a tool that seeks to visualize key elements of your temporal

setting. Each of the sessions will last approximately one hour and will take place over a three-month period.

What are the risks associated with the Study?

There are no material risks or hazards identified with this study. This research has been risk assessed as part of the University of Cambridge Registration Viva process and is subject to ██████████████████████████████████████ [Section 19 of Research Agreement]

What are the potential benefits of taking part?

There are a number of potential benefits of engaging in this study:

- **Personal**: it is an opportunity to kick-start (or re-visit) a change that you would like to make to what you do
- **Deal-making community**: it represents a chance to co-develop an innovative and practical approach to delivery within the wider deal-making community at ████
- ████ it represents an opportunity for ████ to capitalize on any successful output from the research on pre-agreed, exclusive and preferential terms
- **Research:** it is a chance to meaningfully contribute to the development of knowledge and practice

Will my taking part be kept confidential?

All personal information collected over the course of the study will be kept confidential. To avoid any chance of identification all participants will be anonymised (e.g. given an unrelated code name that bears no connection to their 'real', given names). To protect the site of the research ████ will also be anonymised.

The core data captured during the study includes aspects of time use, temporal orientation/direction, connection, flow etc. This data is <u>not</u> commercially sensitive and is of no value or use to anyone outside the specific remit of the study. As noted above the data cannot be linked in any way to a particular individual, or to ████ and any of its affiliates.

Data protection and security is an absolute priority for the study. Over and above compliance with the Data Protection Act (1998) the process of anonymising personal data will take place in a way that minimizes the potential for unauthorized access (e.g. using an air-gapped computer). This computer, and its individual files, will be password protected and held in a safe and secure location. Barry Rogers will be the <u>only</u> person who knows the required passwords as well as the storage location.

What will happen to the results of the study?

Given the nature of an action research study the results of the research will be shared with individual participants, the commercial community as well as the management of the ██████████████. This is to maximize the possibilities for meaningful change at ████ from the outputs of the study.

The study will be published as part of a doctoral submission at the University of Cambridge. Results may also be presented at conferences and written up in journals. These results are normally presented in group form - if any individual data is presented at any stage, the data will be anonymised without any means of identifying the individuals involved.

Finally, there is the possibility of the parallel commercial development of the tool underpinning this research. As noted above ▮▮▮▮ has pre-agreed privileged commercial terms (as well as exclusivity within the energy sector) associated with any such development.

Ethical review of the study

The study will be administered in line with the *Ethical Guidelines for Educational Research* from the Council of the British Educational Research Association [BERA, 2011]. It has received ethical approval as part of the University of Cambridge Registration Viva process and will adhere to ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮ [Section 17 of Research Agreement].

Contact for further information

Please feel free to contact Barry Rogers at any stage if you have any questions, or require any information.

If you would prefer, for whatever reason, to speak in confidence to ▮▮ ▮▮▮▮▮▮▮ please do not hesitate to contact either ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮. Both ▮▮▮▮▮▮ are fully aware of the details of the study.

Appendix B : Consent Form

'Doing what we say we will do – the role of time in the delivery of commitments after formal learning interventions'

I, the undersigned, confirm that (please highlight 'Yes' or 'No' as appropriate):

1. I have read and understood the Participant Information Sheet

    Yes / No

2. I have had the opportunity to ask questions and have had them answered

    Yes / No

3. The procedures regarding confidentiality, anonymity and data security have been clearly explained to me

    Yes / No

4. I understand that my participation is voluntary and that I am free to withdraw at any time without giving a reason

    Yes / No

5. I recognise that this study takes place under the terms of the Research Agreement ▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮▮▮▮ between ▮▮▮▮▮▮▮▮▮▮▮▮. and the Researcher [Barry M. Rogers for ▮▮▮▮▮▮▮▮▮▮]

    Yes / No

6. I voluntarily agree to take part in this study

    Yes / No

7. I, along with the Researcher [Barry Rogers], agree to sign and date this informed consent form

Participant:

_____   _____
   _____
Name of Participant   Signature   Date

Researcher:

_____   _____
   _____
Name of Participant   Signature   Date

Appendix C : Semi-structured interview schedule (Version I)

Q1.   Participant I.D.   [   ]

Q2.   Gender

Male   Female

Q2.   Date   _____

Q3.   Time   _____

Q4.   Participant information sheet (PIS) and Consent Form

Signed consent   Yes   No

PIS Sent   Yes   No

PIS Read   Yes   No

Questions   Yes   No

Please note the on-going experimentation with the labelling of Dimensions (compare to Appendix D)
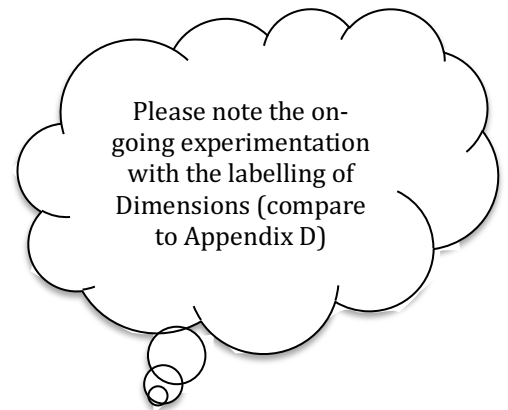
I am looking at the impact of time on practising new behaviours. We know that practise makes perfect and unless we use a new behaviour, we lose it. So I am interested in how stuff (particularly time) often gets in the way of our best intentions.

I have some questions relating to your day-to-day temporal setting. Is that ok? They should take around 45 min (max).

Before we start can I ask...

Q3.   Do you use an online calendar/diary (e.g. Outlook or Ical) for scheduling activities at work?

Yes   No

Q4.   Would you say that this calendar/diary is a fair reflection of your activity (what you do) during your working day?

Yes   No

If no, what is the reason for this? _____

Thank you. I wonder if we could return to that a little later?

Traction [capacity, subcontracting, identity]

I am interested in the role that meetings and commitments (f2f, virtual, calls etc) play in your working day...

Q6.   Would you say that meetings (f2f, virtual, calls etc) are an important part of your daily work activity? [I will define meetings as a commitment you have with someone else]

Yes   No

Q7.   In a regular working day when do these meetings tend to start?

Start   before 7am 7 8 9 10 11 12 13 14 15 16 17

Q8.   When do they tend to finish?

Finish   10am 11 12 13 14 15 16 17 18 19 20 after 20:00

Q9.   (This may seem like an unfair question but do you think you) Can you estimate for me what percentage of your working day is taken up with meetings (f2f and virtual)?

If I give you some options...

Less than 25%

Between 25% and 50%

Between 50% and 75%

More than 75%

[Momentum/flow]

Q10.   Do you recognize the term 'back-to-back' meetings or commitments?

Yes   No

Q11.   Is it a term that resonates with you in terms of structure of your working day?

Yes   No

Q11.   If yes, what % of your day do you feel is spent in back-to-back meetings?

Less than 25%

Between 25% and 50%

Between 50% and 75%

More than 75%

[Transparency/visibility/control]

Q12.   Is your electronic diary *accessible* to other work colleagues? (e.g. can someone else see your availability?)

Yes   No

Q13.   Is it (your electronic diary) *open* to other work colleagues? (e.g. can someone else see you availability and put in a meeting?)

Yes   No

[Control]

Q14.   How many people can put a meeting in your diary?

No one

Someone   How many _____

Anybody

Q15.   Does anybody formally manage your diary?

Yes   No

Q17.   Are they given guidance about managing your time?

Yes   No

What is this guidance? _____

Q19.   How far in advance does your diary tend to 'fill up'? (Defined as your understanding or feeling as to the next period when you have a meaningful period of free time available)

- **Week**
- **Month**
- **2 months**
- **6 months**
- **6 months +**

Just two more questions here….

Q21.   (Off the top of your head) when is the next free day in your diary?

_____

Q20.   What is the furthest commitment in your diary? _____

Backdrop

None of us exist in a temporal vacuum. There is a wider context that impacts on our capacity to act . I am interested in how you would describe your external (commercial and competitive) working environment?

If I give you two terms can you tell me which one best describes the character of this external 'world' (how it is defined) and what is the balance between them?

Is your world defined by….

Q22.

Continuity				Change
100	75/25	50/50	75/25	100

Q23.

Steadiness				Volatility
100	75/25	50/50	75/25	100

Q24.

Certainty				Uncertainty

100	75/25	50/50	75/25	100

Q25.
Clarity   Ambiguity

100	75/25	50/50	75/25	100

Q26.
Simplicity   Complexity

100	75/25	50/50	75/25	100

Direction [Score]
[Orientation]

Q27.   In terms of (your) day-to-day working (business) activity what **matters** most?

- The past
- The present
- The future

Q28.   How would you **rank** these (in terms of what matters to you)?

- The past [ ]
- The present [ ]
- The future [ ]

Q29.   In terms of day-to-day working (business) activity what do you **think** about most?

- The past
- The present
- The future

Q30.   How would you **rank** these (in terms of what you think about most)?

- The past [ ]
- The present [ ]
- The future [ ]

[Open-ended]

Q31.   In your day-to-day working (business) activity do you routinely feel that you have enough time to do everything you need to do?

Yes   No

Q32.   Is your work ever (finally) done?

Yes   No

[Pause]

Q33.   How many opportunities do you feel you get to reflect during the day? ....

[External drivers]

Q34.   What sort of deadlines/targets/commitments do you have in your working life? Over the next
  * Day [ ]
  * Week [ ]
  * Month [ ]
  * Year [ ]
  * Over a year [ ]

Pace

I would like to get a sense for the pace of your working life

[Speed/tempo]

Q36.   How would you describe the pace of your working life?

  * Slow
  * Fast
  * Somewhere in between

What word would you use? _____

Q37.   Can you rank this sense of pace for between 1-10, where 1 is 'static' and 10 'non-stop'

1 2 3 4 5 6 7 8 9 10

[Velocity]

Compared to when you started work has the pace of your working life speeded up, slowed down, or is about the same?

Connection

Thank you. In this final section I am interested in the level of online connectedness in your working life and activity.

[Density]

How many connected devices do you use in the course of your working day? (e.g. smart phone, tablet, laptop)?

Can we put a number on this? ....

Do you have...?

Q39
Voice data
- **Desk phone**
- **Mobile**
  - **More than one mobile?**
  - **How many?**
- **Computer**

E-mail
- **Laptop**
- **Phone**
- **Any other device?**

Q40
IM
- **Internal system**

Q41
Txt
- **WhatsApp**

Q42
- **What other connected applications would you use at work?**
- Twitter
- Insta
- Slack

[Distraction]

Q43.   (I know this is an unfair question....) Over an hour of your working day how many times would you estimate you check (all of these) connected devices?

- **Never**
- **2-5 times**
- **5-10**
- **10 -20**
- **Can you estimate how many? ……….**

Q44.   **(I know this is an unfair question)** How many work related e-mails do you tend to receive in a day (24 hour period)?

- **0 - 10**
- **10 - 20**
- **20 – 50**
- **50 +**
- **Can you estimate how many………..**

Q45.   When do these tend to come in?

- **Regular pattern (throughout the working day)**
- **Bunched patters (throughout the day)……………**

Q46.   How many e-mails will you tend to send in an average day? ……………………

Q47.   How quick do you tend to reply to e-mails?
- Immediate
- Within an hour
- Within a day
- It depends (on what?)…………

Q48.   How long can you go without checking your phone? ………………

Question suggested by the interviewee – What are other people's expectations of how quick you should reply to an e-mail?

[Presence]

Q49.   How would you describe yourself? As someone that is
- **Always on?**
- **Sometimes on?**
- **Never on?**
- **Somewhere in-between**

[Boundaries/blurring/colonization]

Q50.   Do you check work related e-mails from home?

Yes   No

Q51.   In the last week have you checked your e-mails from home?

Yes   No

Q52.   Do you check e-mails in the morning before you come to work?

Yes   No

Q53.   When would be the first check?

Q54.   Do you check e-mails in the evening after you have come home from work?

Yes   No

Q55.   When would be the last check?

Q56.   Do you check e-mails over the weekend?

Yes   No

Q57.   Have you looked at your phone during the night over the last month?

Yes   No

[Agency/Control]

Q58.   Do you have an (active) strategy to turn off the wireless on your connected instruments (beyond meeting times)?

Yes   No

[Addiction/seduction]

Q59.   How many times a day do you actively switch off your connections?

Q60.   When was the last time you consciously turned off your wireless connection (bar meetings etc).
- How long did you do that for?

Q61.   When the internet connection is down how long can you last before getting irritated/anxious?
- **Minute**
- **Hour**

- **Day**
- **Other……..**

Q62.   In your estimate what percentage of your day is taken up with online connecting?

Thank you. The next step.

Can you send me a screen shot of what your interface looks like?

What have I missed? (Travel time)

What was your impression, at all, as we did that?

What sort of temporal routines, patterns, rituals do you have?

Appendix D : Semi-structured interview schedule (Version II)

Q1.   Participant I.D.   ☐

Q2.   Gender   Male   Female

Q2.   Date   _____

Q3.   Time   _____

Q4.   Participant information sheet (PIS) and Consent Form

PIS Sent   Yes   No

Signed consent   Yes   No

Hi – how are you? [Small talk]

Thank you – apologies for parachuting once again

I would like to do **two things.** (ONE) very briefly **check-in** in terms of practising ██████ and (TWO) also **step back** – 10-15 minutes (as part of the research I described) paint a picture of your time use

MY PLEA Honest. I am not expecting a particular answer one way or the other.

Everything we say and discuss is totally **anon and confidential.**

Record, miss any comments. I promise I will wipe it afterwards.

OK?

Can you give me some (a few) words to describe your world of work the last two months?

Two months since we last spoke, over this period to what extent have you been able to maintain focus on practising the behaviour you highlighted ██████ **[This is where I need you to be as honest as possible]?**

How would you rate your ability to practise?

Thank you.

I would like to ask you **SOME QUESTIONS** that briefly paint a picture of your time use? Counterintuitive, 30 questions. Yes or no.

RATIONALE make more visible context **practice** new behaviours. **Output**

Density

Can I start with some basics?

1.   What time does your work day tend to start?

2.   What time does it tend to end?

I would like to get a feel for the role of meetings in your day.

I am defining meetings as ANYTHING (f2f or virtual) that blocks out time in your diary
- Internal **F2F** meeting with colleagues
- External with clients
- Conference call (like this)
- Business trip
- Workshop

3.   On a regular (working) day when do these meetings tend to start?

4.   When do they tend to finish?

5.   Can you estimate for me what percentage of your working day is taken up with meetings (f2f and virtual)?

6.   Do you recognize the term 'back-to-back' meetings or commitments? (e.g where one meeting runs into another)

Yes   No

7.   What % of your day **do you feel** is spent in back-to-back meetings?

8.   Do you use an online calendar/diary (e.g. Outlook or Ical) for scheduling meetings at work?

Yes   No

9.   Is your electronic diary *accessible* to other work colleagues to request a meeting? (e.g. can someone else see your availability?)

Yes   No

10   Can they place a meeting?

Yes   No

Connection [interruption]

Thank you. I am interested in the level of online connectedness in your working life.

11   What online devices and applications do you use at work? (e.g. phone, laptop) [Skype for business]

12   When would be the first check of these work related (e-mails) devices?

13   When would be the last check?

14   (I know this is an unfair question....) In any one hour period of your working day how many times would you estimate you check (all of) these connected devices and applications?

Mini checklist

Respond to a ping/notification
- Ping you (IM message) on your computer
- Any other form of platform (Slack, Yammer)

Or you feel the need to check your phone/device
- Check personal
- Drop by your desk or office unscheduled

Just as an aside how do you know when there is **activity on your phone or computer**?
- What indicators of activity are there on your phone or computer – that something has arrived or is trying to get a hold of you?

15   **Again I know this is an unfair question but** how many work related e-mails do you tend to receive in a day (24 hour period)?

16   How many e-mails will you tend to send in an average day?

17   Do you check work-related e-mails over the weekend?

Yes   No

18   Have you looked at your phone during the night over the last month?

Yes   No

19   Do you have a (pro-active) strategy to turn off the wireless on your connected devices?

Yes   No

Direction [Orientation]

I would like to get a sense where the emphasis/priority lies for you between past, present and future

20   On a day-to-day basis at work - what drives you?

- The past performance of your business
- Present performance of your business
- Future performance of your business

21   How would you rank these?

22   What do you think about most on a day-to-day basis? Again

- The past performance of your business
- Present performance of your business
- Future performance of your business

23   How would you rank these?

Pace [Speed/tempo/velocity]

I would ALSO like to get a sense for the pace of your working life

24   How would you describe for the pace of your working life?

- **Slow (pace)**
- **Fast (pace)**
- **Medium (pace)**

25   Can you rank this feeling of pace for me between 1-10, where 1 is 'Static' and 10 'Non-stop'

1 2 3 4 5 6 7 8 9 10

26   So in a normal working day do you routinely feel that you have enough time to do everything you need to do?

Yes   No

27   Is your work ever (finally) done?

Yes
[Pause]

28   Do you feel that you get opportunities to reflect during the working day?

_____

Backdrop (visibility)

Finally none of us exist in a vacuum can I ask you

29   How do you think about your **external** (business) [competitive and commercial] environment?

Is it defined by…

Continuity   Change

What is the percentage balance between these?

30   Stability   Volatility

31   Certainty   Uncertainty

Thank you.

What have I missed? (Travel time)

What sort of temporal routines, patterns, rituals do you have?

Semi-structured Interview ███

- Very open to the call

- No problem with recording

- Shared his screen re meetings (sent me these afterwards)

My bullet point notes and reflections made immediately after the call

- I shared Cal Newport (author)– really resonated with him. He really likes the labels HOW CAN I USE THESE AS PART OF THE METHODOLOGY?

- Biggest **ASSUMPTION** – this is **not 'proper work' (WHAT IS PROPER WORK?)**

- Reflection time **OUTSIDE** the working day – running

- Very strong opening piece about the difficulty of embedding and reverting to type.

- The role of the **30minutes 'in between'** meetings

- Playing with time. Keeping blocks of time free. Protected time.

- 'SPINNING PLATES'
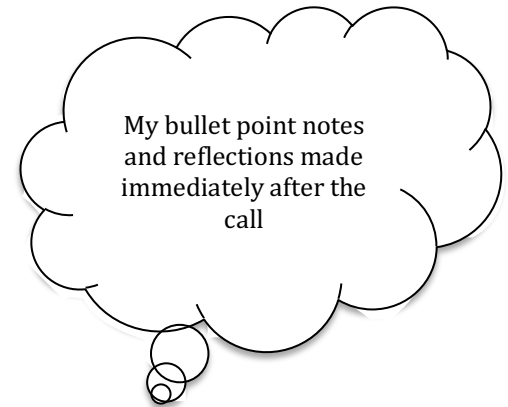
Interview content
- 36 minutes in total
- Catch-up chat (6 minutes)
- 7 minutes removed (specifics of restructuring)
    - 4 minutes during interview

- o 3 minutes at close

How are you?

Life in general over the last month or so? Well, absolutely manic. Work wise, the message compared to when we were on the course is not that much different really. The Company went thru its rationalisation around a year or so ago and all the operating units are very leanly resourced and there is a big focus now on growth so there are lots of opportunities for projects on-going which keeps everyone sure busy, which is good news because for sure we would not like to be twiddling our thumbs, equally we are quite lean so keeping all the balls in the air is quite a challenge.

What has it been like at work after the program? To what extent have you been able to consciously focus on the behavioural commitments you made on the program?

Consciously focus on the behaviours that we focused on the program. I would say, if I could put a number on it I would say 25% and the reason I say that is that many of them are not part of what my job focuses on. So I spend a lot of time traveling, visiting those stakeholders and it did not mean that I was necessarily casting my mind back to the programme and going over the materials but that I was doing that anyway. But it has not totally been discarded either, I have had a conversation with my line and I have another one set up next week and I have looked over my notes on occasions. But one of the problems with these types of things (Programmes) it requires just a small amount of time in your working week to be cast aside for thinking and for reflection and that is the one part of my job that I miss and so, eh, coming out of Christmas one of my goals for this year, nothing to do with the company has been to shed a few pounds and to take up running again. On the day after Boxing day I started running again and I have been doing every other day since. I really find it helpful because I can think . Plodding along on the tread mill or in the fields ...trying to make sense of the world around me. It tends to be work focused because that is

where the majority of my energy goes in terms of time and stuff. I think that that is an honest answer. It is always the problem with these types of courses, trying to take what you learn and then operationalize it on a day-to-day basis is a real effort and that takes time and you need to be very focused to do that.

You tend to just think about the key messages and when we left the course there was a hell of a lot in there around challenging orthodoxies and considering your stakeholders and you go away with those key things in your mind and it is good because you see the world in broader terms but it is in the back of your mind, it is an awareness, and if that is the intent then I think it is successful but if it comes to day to day applying those things, finding areas where you can apply these things then that is far more challenging because you are just concerned with what you are doing and you tend to revert back to the way you were previous – that is natural.

Can we step back and talk about the role of meetings

%, Yes I would say, easily 70%. You don't have a screen with you and you can see what is blocked out.

Could you do that for me as a screen shot?

My guess would be that if you compress this up it comes to around 60-70%. One of the problems that gets overlooked is that you need 10-15 minutes in between, maybe 30 min, just in case they overrun and to prepare and collect your thoughts for the next meeting. If you look at the calendar and the spaces in between they are almost meetings, preparation for meetings, trying to do meaningful work in the 30minutes between these does not work because I have got lots of stuff that I need to do. Some of it is orientated towards meetings, what I need to discuss with others but other stuff are deeper project where I need to put together a stakeholder plan or put together a guideline or update the model strategy for the region. And they take hours and hours of thinking. They don't just happen overnight. Where I struggle is where I can find a string of a few

hours where I can make a meaningful contribution to those targets. It is so so bitty. That I think works against you.

When do you arrive at work?

I am in for 8 and normally start around 8:30 till 5:00. I try to keep meetings within the normal 8-5 working day and I try if I can to load them into one day or to keep blocks of time free if possible. I find that what really helps is me blocking time off myself in my calendar for stuff like emails – you will see this in the screen shot, ▮▮▮▮▮▮ – on a Friday afternoon where I can go through all the emails and I can file them or do whatever I want to do with them because a bunch of stuff will come in over the weekend anyway. If you don't put it in someone will take it and you need to protect yourself by blocking it out.

When do you leave?

I would leave work by around 5:30/6:00.

Can you tell me about your online diary?

Accessible to others and you can see whether they are busy or not and you can slot something in. Usually it tends to be for something relevant and you accept it. But the issue is that people don't tend to filter as well as they should. I am responsible for a number of people across Europe so they are all keen to keep me informed but there is a balance to be struck. If you invite too much information you will be swamped but if there is not enough issue arise. It is a balance.

And connectivity?

Comms, well is it is SKYPE. Emails are standard ▮▮▮ outlook. I have got a ▮▮▮ issue Iphone so on there I have got all my encrypted emails and calendars. It is 24/7 in that respect. I also have an Ipad. There are a couple of levels of service

so ▮▮▮ allow you register your own device. This is my own device so I registered that so I want easy access to the wireless but I have ended up with calendars. which I don't necessarily want.

What is the first time you might check?

So I check the calendar as soon as I wake up to make sure that there is nothing that I am missing for the day. It depends if there is a busy project then it can be very late but on a normal night I would say I would not check after 7:00. that is rough. Sometimes you have an easy meal and if it beeps and you check to see if the guy has sent you the email but you need to switch off and watch telly and be with family. If you don't do that it is a downward spiral…

How many emails do you receive?

Easily 30 or more a day.

How many do you send?

20 I guess including meeting requests. No, maybe more

How many times are you interrupted in any given hour…you check proactively or reactively? (22:42)

WOW! [laughter…thinking]

I would probably…[hesitation] if there was a study I would be probably be surprised with the outcome IT FEELS continual. And so certainly call it 10 times an hour, I am only guessing but it is possibly more.

Do you check over the weekends?

I don't log my laptop on. I sometime look at my emails on the phone. This is the downside – and the upside- of having a work device it is constantly with you. It is 24/7, I look at my emails occasionally over the weekend but I do not open them unless it is a priority (...like my line manager)

How would you classify your orientation to time, to the past present or future?

Generally present and future. It is quite busy so there is not really a great period of time but often looking back and what you have done wrong and learning lessons is very important for improving for the future but we don't do enough of it at the company and I don't do enough of it and I find that I am spread quite thin and so the vast majority of the time is spent dealing with the immediate deliverables or trying to plan that you don't get caught out or planning for what comes down the line on a weekly, monthly or even a yearly sometime. We put together plans but the real focus is kind of in a one-day to a three-month window. That consumes most of the effort that I put in. And that is by necessity I am not suggesting for a moment that that cannot be improved but it is what is required (26:20)

How would you judge the pace of your working life? Fast, medium or slow pace? How would you describe it?

It varied day to day. I would say it is almost medium. Some very fast and slow days. I would rank it at a 7 or 8

Do you have enough time to do everything you want to do? Is your work ever done?

NO, there is always stuff that gets carried over. No, never....I had this conversation the other day with █████

What about reflection time?

No, none. Just to give you a bit of feeling. A year or so ago I was having some beers with my line manager and we were talking about being stretched with everything that was going on. And he said that it felt like spinning plates on a stick, and it is just a question of keeping then going and if you get to a situation that some plates fall then you got to make sure that the plates that fall are not that important and it is this prioritization thing going on all the time in the back ground and I related to that and trying to get some thinking time in between spinning the plates does not work because they fall off (28:49)

How would you describe the environment in which you work, as defined by continuity or change…and what is the percentage between them?

[Confusion over question]

Oh I suppose it is change 60/40

Thank you

[Conversation re follow-up]
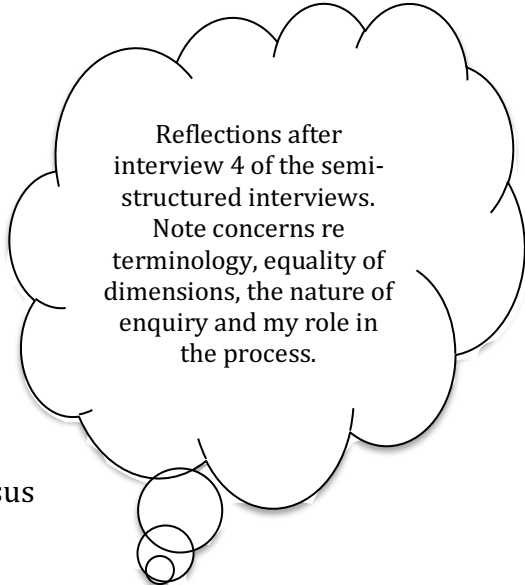
Appendix F : Reflections post semi-structured interview

Reflections on P

- Build and sequencing of dimensions good – especially CONNECTION at end

- People want to talk (this is not pure quantitative). This is extremely valuable – especially towards the end. This is where the valuable stuff comes.

- Need to find a way of describing on-line usage (check)

- Clarify what I mean by the environment (wider versus role)

Reflections after interview 4 of the semi-structured interviews. Note concerns re terminology, equality of dimensions, the nature of enquiry and my role in the process.

- What do I mean by learning commitment?

  o The commitment can be basic?
  o Does it represent the real (informal) learning?

- What is my mindset? What happens when it is not what I expected and how does it impact me? (e.g. him saying he only checks twice an hour when I know it must me more)

- Is the questionnaire the best way to get data? What is better? How can it be triangulated?

- Is this credible in the eyes of the interviewee – do I need a bridge in some way?

- The process of analysis of the results. Read quickly, clarify, pencil, write up, revisit and load into SPSS

- There is rich data and stories from this process

- ▮▮To what extent are there **different temporal profiles** (▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮

- Need for more data – this **PROCESS** is incredibly important. It is as much about the process as anything else – as well as the **STORY** you tell. Process plus credible data will win. Getting to people is a problem.

- Why was I **feeling down** after this interview? Why did I lose **ENERGY**?

- I had believed my own bullshit – having spoken and been in sell mode for so long (this need to be a flexible Tool)

- I desperately needed a **design thinking mentality and mindset** – need to fail fast

- What do I need to do?
  - Refine my opening story
    - See it as part of a wider benefit (IMAGINE)
  - Look at categories (clear, unambiguous wording)
    - VUCA

  - What are the key/**BASIC** measures that I want to represent? (this is just a basic prototype)
    - Look at mobile per hour (So given all of that...)

- What would make you do something?

Appendix G : Guide for Tool Pilot Interviews

http://www.cl.cam.ac.uk/~as2388/time/

Remember small talk, connection

Lovely to see you and thank you. I wanted to do two things
- Briefly check in…
- More specifically **test a tool** with you

This is part of my **research**
- Nature of research - confidential and anon
- Record
- Please be honest

I would like to **record**. This is stripped of all its connectivity. Air-gapped.

Can I give you an **update on** Impact

- Composition – nature of the last two groups
- Growth mode

General questions

- How easy has it been to maintain a focus on your commitment?

- What has got in the way?

- What has helped/hindered the process of practising?

Specific questions
- Set-up of tool (move through each page – lead with a question)
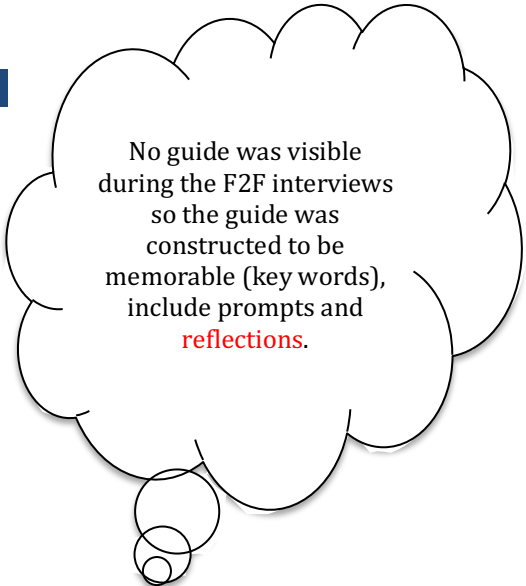
Keep it hugely simple

Set-up so important (clear, crisp)

How much of my time am I talking? (ask questions)

Reference back to what I heard in the questionnaire

No guide was visible during the F2F interviews so the guide was constructed to be memorable (key words), include prompts and reflections.

This is a basic, simple tool to have a more realistic conversation about applying (practicing behaviour) after Impact.

I am interested in what happens *after (emphasis)* we leave ▮ *apply* (…that process of '*active forgetting'*)

At the moment this comes down to a **personal intention/commitment** to **practice** (hugely important, reinforce that)

But that is only one side of the **equation (environments).** There was a very famous social psychologist Kurt LeVEEN…

I want to **capture** that second element in some way – we live work and operate (shaped) in environments saturated by time (proxy)

The interface for this takes the form of an **electronic calendar**

Basic - coaching/conversation/elicitation **tool**

You are how you spend your **time**…

What is the aim/purpose?
- To have a more **realistic** conversation about your commitment
- Be more **aware**
- **Play** with your time

USE TOOL

What is your reaction?
- What, if anything, resonates?
- What, if anything, connects?

When would this be used?
- While it is still hot?
- Or prospectively?

Where it would be used?

- F2F
- Skype

How
- Data
- Build together? (more impactful/interactive)

What is the one thing you could do to *play* with your time? What would you change? (manipulate)

How does this change the (temporal) story we tell about ourselves?

Appendix H : Transcript from face-to-face Tool Pilot Interviews

Switch on of recording after 2 minutes of small talk. [Recording 55:06 in total]

[Long preamble from me that ends in…]

How have you been able to maintain focus on practising the behaviour (from the program) since the last time we spoke in January?

From the course…it has probably waned I think in the period since and I think there has been an element that it has been really busy, which was almost the purpose of the course, reminding us of the need to take a step back. I think that I have probably fallen back into, over the course of the first four months of the year, been overwhelmed by the number of tasks at hand, almost at times, almost paralysed by the weight of too many things to do and never…it is only when we have conversations like this that you reflect and step back and breath. When you think that that was the advice that I got from (the coach on the program)! [Laughter]

So in January I got a new set of responsibilities in comparison to last year…I think I am happier with that set of responsibilities but it is a mix of being ███████ ███ of the project here and supporting a team in London, as a resource that they don't have. The difficulty that I find now is satisfying both masters so each minute that I spend on one is a minute that I am not supporting the others and vice versa. I think that one of the sides has a full suite of activities that they would like to get me involved in but that is potentially overwhelming and could take up 100% of my time. I think what I am trying to do positively, which I would not have done in the past is to hold the mirror up to them and say that this is not realistic in terms of what you can expect me to deliver and I am making attempts to just continue to drown. Like I had the conversation with a former colleague ██████████ this morning where we catch up now and again and my concern is that at the end of the year my performance is judged on what I have not delivered not what I have delivered so

Statements in YELLOW formed basis of initial coding.

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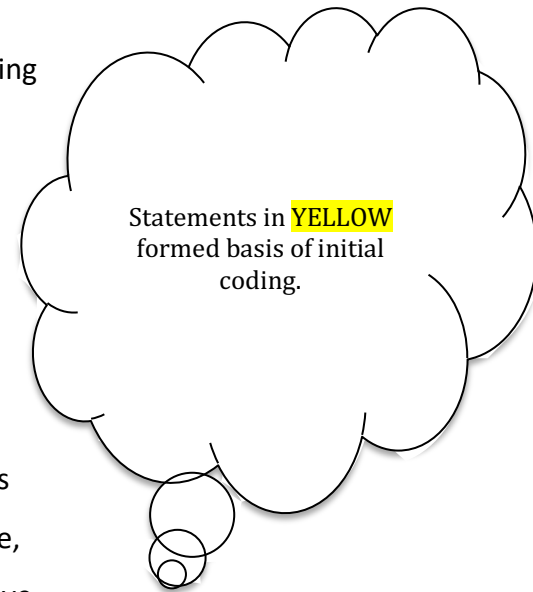
there are things that are not been delivered but <mark>there are only so many hours in the day</mark> and so things are getting done but there are things that are slipping as a consequence. So you will always find good examples at the end of the year of things not done but it is for a very good reason. So my challenge back to the ██████

███ is that this is not realistic and I have said to them that they need to find an added resource or added help for me….there is an element of regret that I may not be able to do everything but there is a positive there in taking action about what is realistic and I do think in the past that I would have left things rumble on and you do get into that paralysis that you fail to deliver anything because you are trying to keep everything moving, everything slows down as a result. I think that is where I am.

I think that the other thing that really hit home in November was around listening and I think there are good examples of that given the project I am working on. We are working with a joint venture partner very closely, building a good relationship with, we are going out to get offers from a lot of other people for a service. One example where I will be calling them today is where I can see something is going on there and I am peeling back the onion, so what is going here…the position you are taking feels very difficult to the relationship that we have been building over the last four months. If I think about the course I don't think that I am actively thinking about the course but it had such an impact that these things are perculating. If I think about that example and what I would have done in the past I may have just ignored it and just continued regardless and that is a recipe for disaster.

And that is really interesting at what level this seeps in and continues to operate at and forces those choices…

Yes, and when I think what I have done over that last few months, one instance where I had to drop everything. And it was done but the reality was it was not drop everything but 'fit this in' among everything else you are working on and try and make all of them work. The reality is that <mark>it is not possible to drop everything</mark> so I attempted to keep everything moving and there is probably not a lot of recognition

of that. This was delivered on time but the reality was that the other things I was working on continued at the same time as well.

Someone referred to this in the conversations that I had after November as 'keeping the plates spinning'…

I think that is a great analogy for what we do. It is just not realistic to say that you will let everything else drop for a period of even three weeks. When I told the leader of team I was working with that I could not come to her meetings for three weeks she went nuts and I can understand why and then within a couple of days I had made the judgement of "I am going to try keep things moving for you'. There will be meetings that I will miss and in the end she was happy. But I would not have said that if I had not been able to make the judgement that I could manage it through

I do set up and introduce tool
- **What happens <u>afterwards</u> (nods)**
- **Focus on the individual (nods)**
- **Lewin equation (smiles)**
- **Actively forgetting (smiles)**

[Do I need this to be so long? Find another way of saying 'environment']

Huge traffic outside room – hard to hear (14 minutes) 10:14

It is interesting as there is possibly even another angle to this for me where I have been away for three years in Norway and in that time for many reasons I have changed as a person but I have come back into an environment that is exactly the same as it was before I left. It is almost another dimension to this – I feel very different but the environment is exactly the same and that has been a bit of a struggle for me since I came back.

Where is the space in your diary to do what you have promised? Already we can see that that is large portion of the week taken up with meetings

70% meetings, I don't know!

It begs the legitimate question…

Yes, yes, where is the <mark>thinking time</mark>?

There are back-to-back meetings…

Yes, completely different subjects

You get to four in the afternoon and you wonder where did that day go…

Yeh!

There are two elements here - the space that is taken up by meetings and the pure amount of momentum that they generate through the day…

That makes me think/ Last Friday afternoon. I sat down at my desk and I think it was 2:30 in the afternoon and I sat down at my desk and I said to myself – WOW – not more meetings and then you have after that initial, like , GREAT, but what am I going to spend this remaining time on then. And that can be overwhelming also because while there are no meetings and you got that time to breath and reflect if you add up all the subjects that you have discussed over the previous few days what are you going to pick off first because there will be actions and follow up coming out of those meetings and it is difficult to know how you are going to spend that next hour/remainder of the day on this one topic and inevitably you end up getting distracted by outlook and email…

Let's get back to the distraction piece in a moment. It is almost like this is a form of reverse paralysis…

YES! I had a half day one day last week and I had four hours before I went home and it was like wow, I have fours hours solid and unfortunately I had an IT problem and I lost two hours. I ended up with the IT guys trying to resolve it and I ended up going home on that evening so frustrated that I missed that opportunity that I had a full four hour block where it was almost exciting and I lost two hours in the middle and it almost blew away the whole window, a missed opportunity that I did not feel I would get back…

There is free space here but there is the phenomena of availability on SKYPE for business. Your diary is visible and then people can put meetings in at any point in time so the extent that you can have control over that visible time is called into question

Yes, yes…

There is a *contingent element* to the free space that you have

YES – ABSOLUTELY! I would fully agree with that It could go at a moment's notice. Absolutely!

The metaphor that comes up is that idea of playing with time. **No response to this.**

Yes. It is tempting to show you my diary. I could give you some more examples but I am absolutely with you with everything you have said so far.

[I move on the distractions…]

That is something I absolutely don't do – log on after work.

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[I show him the build and he laughs]

This is so realistically, and the week starts to look like. If these are meetings these get squeezed out and this becomes a more realistic temporal picture. So so realistic! Yes, completely realistic. It is how it works… **[LET HIM FINISH]**

I am pretty good at that but having said that, over Easter [26:23] I took the Monday, Tuesday and Wednesday off for Easter and because of this 'drop everything' piece of work I found myself connected all through that period, just checking that anything had come in, thinking about it and when I came back to work on the Thursday I felt like I had not switched off, not had a break and that is probably the first time, and maybe I can justify it as the basis of a piece of work that is coming to a conclusion but it is not my normal pattern of behaviour when I take a holiday and I was pretty disappointed with myself. But if you look at this weekend gone. Nothing. I just don't do it at the weekends and the evenings but because of this piece of work and the seniority of the people here and that these guys are connected all the time. Just checking, just checking but it did mean that I did not fully relax during my time off.

You have to be visible…

I felt that, yes I felt that responsibility to be available if I had got a response. And I did get a response and there was no further action required and it could be left till Thursday but you are still processing what am I going to do when I get back in on Thursday. Still thinking about it! That is three of my thirty days this year when I am fully engaged with what is going on at work.

And not present as a consequence?

I think that the difference was that I spent those days at home. if I had been away maybe I would have treated it different but I still would have checked

Thumping of people in the background!

The logic of this is tool is to give some simple visibility…

There is also an element of orientation…and speed. And depending on where people locate themselves on this, how realistic is it to say that people will find time to pause?

I think I probably said that I am anchored on the present and my future is only very short. And it extends to home life as well as the office. Like yesterday evening was a very busy weekend, wife was away with one of the children and another was at scout camp and it was just me and the other child at home. But there was so much going on through that weekend I could not even afford to think about Monday. So I said what is happening this week I could not allow myself to think about the office it is also managing the home life as well. They are not mutually exclusive. You can see that in my calendar. How do you manage the two? For example I should have been going to London tonight and it is moved to next week now so I will worry with that next week. I am not allowing myself to think about next week I am SO focused on this week.   In terms of future planning there are some meetings that are three weeks out and are fixed in the calendar but as far forward as I am thinking is my holiday in July and I cannot afford to think any further than that and I think that that is typical of how far forward people think. Maybe to the next family holiday and then there is a gap to a much shorter period in time. Maybe a part of that is the perusal situation that is driving me not to think too far forward if I am honest. This is something that resonates me

Yes, NOT wanting to think too far forward.

I describe the tool and the process after the program e.g. to place intentionality into a more realistic temporal setting. [34:09]

How does this represent what your diary looks like? Any thoughts…

Well, what you are showing there [Moving screen up to present, future, fast] is ABSOLUTELY reflective of my week, and every week and the way, and I don't think that it is specific to me or the people that were on this program, I can imagine that it resonates with anyone in this building, inside the {company] or outside the [company] it is the way that the working life has become and is probably a reflection that we are always available somehow. So I guess the thing for me is (hesitation)…something about the who, what and how! How can things change. Who? I can make an attempt to do that myself but it also needs the buy in of all those people who interact with me and if they are not going to respect that, or do something themselves – how is it going to work? What are the steps to managing the control?

OK If I were to paraphrase you there is an element of 'thank you but so what?' [Huge laughter]

At the moment I can have that conversation with some of the others that I am working with and they will just say. Great, you have just described my life! So it is always like 'Suck it up…we are all interconnected, linked up to this type of pressure so what are the <u>tools</u> that can be used…'

And my approach at the moment is just to shed activities. To lighten the load. Cut, cut, cut. I had a conversation the other week with the x manager in London and he said that they have a contract with y company that they want us to review. So they have written a draft and it is based on something that we think we will win in May or June and what I said was well this activity is going to go right to the bottom of my list because why should I spend a minute on something that we do not know is happening and it we do not get it that is a waste of my time compared to other activities that I know are real. He did not want to hear that? But it's true because I then went to legal and he said why would I spend my time on this, this is not real business? It is absolutely the right message but the other guy just wants it done. My

==view of the world is this – everything is overwhelming – but his view is, I just need this done==. You have that a clash!

Can I run something by you re the practicality of managing all of this? Any ideas how to minimise distractions?

If I look at my SKYPE==. I have never used this functionality==. You can set your status to 'do not disturb' but I have never, never used it. I know it is there but have never used it. Maybe I have done it when I am presenting something. What sort of statement is that? I guess you could also start the meeting by asking people to shut down outlook. I suppose you can sit yourself in a quiet room. Establish the rules of the meeting. Switch your mobile phone off.

███████ said that he will be late for lunch. Wow, look, I got distracted! (LAUGHTER) [He picked up his phone as we were speaking to read a text]

If I set to 'do not disturb' now no one can send a message. ==Maybe this is good test. If I look down contact list there is no one set to do not disturb. Out of all these. Busy – still could receive a message. On a conference call – still could receive a message that could distract him==. Anyone who is red there is on a call or in a meeting but is still contactable. So maybe do not disturb is just a standard. Back to my four hour example. That could be a marker for anyone. Then you are into what happens when someone comes and stands by your desk.

==Have you got a minute is probably the biggest killers of time==. Because it is very rarely a minute. For some you know it could be twenty minutes and for others it could be five minutes. It could lead you anywhere.

Can I look at your diary?

Sure, some business and personal things….

Let me give you some examples. Had a call at 08:30 this am and then met you in this space. What happened when I came in this morning was a request from someone to use this space (free bit) to have a chat about the calls you have to make on this project today. I declined it as I want to use that space to do the activity not just to talk about it. And when I get to that space in my diary now, will it be free? Most likely not. If I mark it as busy I can attempt to do that but if a meeting request comes in I will most likely put all of that aside and end up going to the meeting so in my mind a meeting takes much more priority ==that reserving time to think . I would not decline a meeting just because I have reserved some time in my calendar. I just would not do that.==

So a meeting trumps thinking space??...

I thought it was interesting what Musk said. ==I don't think that I would do that. I would probably sit through it.== I suspect if someone thinks that I should be there I go with it. I have challenged a few meeting requests recently and we have bounced back and forward the why etc. It is continual judgement…

It frees up a bit as we go forward but having said that it is more busy then I would have thought. And this week (5 weeks out) is not even on my radar now. It is not empty is it? I was expecting it to be empty after next week. ==Lots of these are recurring meetings – some biweekly. That is a day out of my week gone==!

Let's look at this day. I have a full day here, a full day at a client's office and my ████████ (family member) has a follow up (medical) appointment so I am supposed to be in three places at the same time that day! I have had all sorts of issues managing this day but in the end I have had to say why I am doing this and ultimately family comes first. I have come to the conclusion that there are some key people that need to know. I don't need his sympathies just that there are from time to time when there are clashes and he is way down the list in those moments.

Appendix I   :   Interview guide for mini-interviews

Mini Interview guide – Participant ███
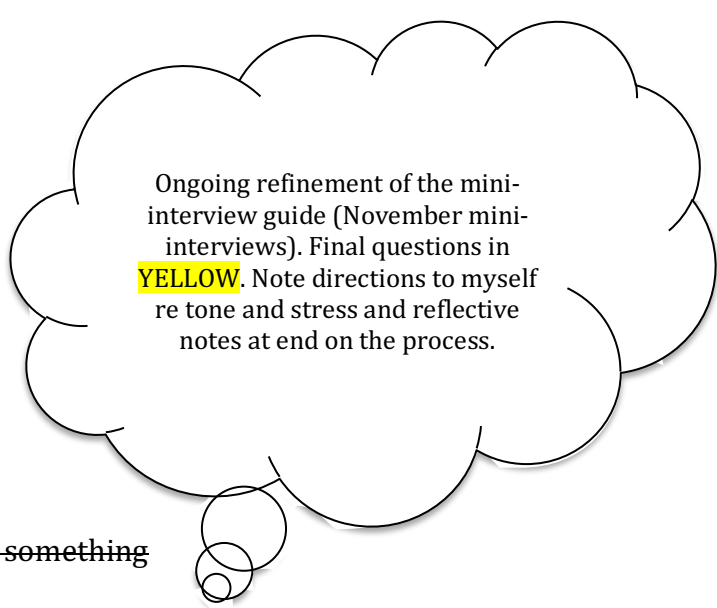
- COMPOSE myself before the call.
- **NBNBNBNBN Tone, Tone, Tone**

Hello. How are you? [**Tone – LISTEN**)

Thank you for making the time.

Apologies for **parachuting** into your workday. I promise will keep to under 10 minutes.

[A]   Update. 30 min call likely to schedule something over next 3 weeks and then…

> Ongoing refinement of the mini-interview guide (November mini-interviews). Final questions in YELLOW. Note directions to myself re tone and stress and reflective notes at end on the process.

I am interested in getting a feel for those some of those factors (stuff) that have

helped or hindered practicing your commitment (tone to stress) **AFTER**

███

As part of that do you mind if I ask you a three –<u>VERY </u>quick questions.

- There are ABSOLUTLY no 'right' answers. I am not EXPECTING a particular response one way or the other.
- I would LOVE YOU to be as honest as possible (if you say…)
- And of course, total anon and confidentiality
- Remind about recording **[PRESS RECORD**]

[1]

If you remember on the final afternoon of XXX you rewrote your 'Monday Morning' commitment and chose a particular commitment to apply when you got back to work.

Can you remind me what that commitment was?

[2]

Can you give me some words to describe what it was like returning to work after the program?

[PAUSE] {HOLD, HOLD, HOLD PAUSE}

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- How did it feel?
    - Has that feeling changed over the course of the two weeks?
- What was the work-load like?

You left XXX with a certain expectation about applying this commitment...

[3]

To what extent have you been able to maintain a focus on this behaviour over the last two weeks?

- Rate it
    - First Monday morning (1-10)
        - Very focused on the behaviour
        - Very unfocused
    - Yesterday
    - What got in the way?

To what extent has YOUR focus on this behaviour been helped or hindered by other tasks and priorities?

[3]   **What sort of time commitment has been involved in practicing this behaviour?**

Are you doing something related to the behaviour
- Multiple times a day
- Once or twice a day
- Once or twice a week
- Once or twice over the two weeks
- Hard to remember

[3]

Realistically, on the basis of your experience (and again answering this as honestly as possible), how satisfied are you about how you have practiced the commitment?

[Pause]

If you were to rank this level of satisfaction for me from 1-5
- 1 Very satisfied
- 3 Middling
- 5 Very unsatisfied

Thank you. I hugely appreciate this...

Reflective notes after interview 7

- Stay away from references to learning – too general. Anyway this is not about learning, it is about doing (ASK this)
  - Other dilemmas. Practice. Apply. Behaviour. To what extent does this reflect muddled thinking in my direction to participants?

- What is the right sequence of questions?

- How do I maintain discipline in asking questions (and in the correct format? e.g.) Not go off-piste. Not lead the witness.

- How do I respect what I am hearing as opposed to what I want to hear?

- What do I really want to find out? (So how many time have you actually practiced this over the last two weeks? as opposed to how happy you are) Also so that I know WHY I am asking the question.

- Using the time as best as possible. How do I tell people about recording (for note taking and destroy immediately afterwards)
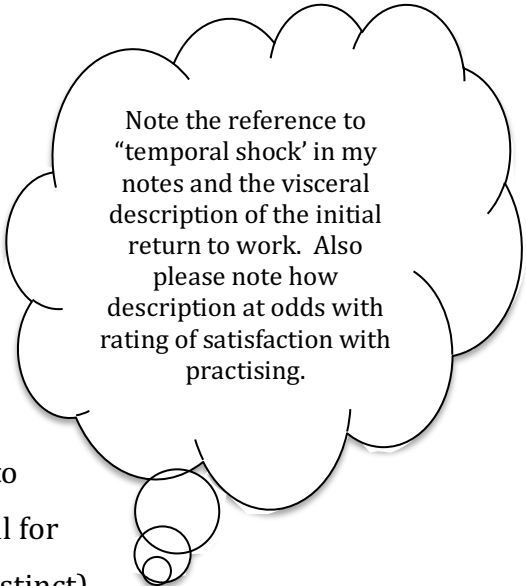
Appendix J : Transcript for mini-interview (November)

Intro chat (2:30 min)

Can you remind me what was your commitment on the program?

Well compared to before the course I modified it slightly my commitment was to work on my stakeholder relations so the 'what' was to improve those stakeholder relations and build trust and obviously the 'how' and the 'why' came after that. And you know you gave us a choice to choose between a behaviour or something deal-related well for me because I am not actually a ▮▮▮▮ role is different... (indistinct)

> Note the reference to "temporal shock' in my notes and the visceral description of the initial return to work. Also please note how description at odds with rating of satisfaction with practising.

Can you give me some words to describe what it was like returning to work after the program?

Emmm...HECTIC (laughter) The main problem on returning is that straight away you turn up and there is an inbox with 100's of emails and that is because you have taken a week out and you have tried to dedicate that time to training as is appropriate and so you know that there are going to be some things to follow up on and I tried during the course to kinda do the most pressing things but it is almost a bit of a contrast the course is one thing...and then you get back to your day job and there is a lot of pressure, well it depends on the individual but for me quite a lot of pressure to make up the lost ground experienced by taking that time out and so then you need to prioritize that and so it is very easy for all the learning from the course to go out of focus very quickly because of that.

Reflection - the experience of **TEMPORAL SHOCK** (to a greater of lesser extent)

To what extent – and I would love an honest answer to this – have you been able to maintain focus on that commitment over the last 2 weeks?

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Emm I would say...ehhh...if I am honest relatively low ... And I need to kinda qualify that, that is not a sign of intent of course that is simply a practical issue, you come back and you have to deal with what is a peak work load and then when time allows you reflect on what learned and so...if I can just give you an idea (example) I went away (from the course) with the white board type scrolling in that last session where we each took our team members through the what, where, when and they gave me some good feedback on what would I do, measure success etc I have had the time to write that up into a powerpoint so that I can save it digitally and I have had the chance to think about the kinda meaningful action that I have identified, start to think about how I am going to kinda go about implementing those but I have not actually progressed beyond that at this stage. ...other than making the powerpoint!

Thank you. Two other very brief questions

How satisfied are you in terms of your ability to practise this commitment? Ranked from 1 (highest) -5 (lowest)

Reflection – Does <u>not</u> reconcile with description

I think I am quite satisfied. I am up at the 2 or maybe 3 level at this stage. The problem is Barry, is for me it is not a switch where I can say that I want to concentrate on this behaviour so all of a sudden I am going to concentrate on my stakeholders – I was always going to concentrate on my stakeholders it was in an unstructured way and so going on the course you learn a lot about the focus on those stakeholders and your orthodoxies and about relationships between people and the way they perceived you and so I came away thinking that if I want to build trust I need more time face to face with people, I need a proper stakeholder management plan as opposed to an ad hoc thing and I think I was doing quite a good job before this it just could be better ...and so taking a more structured approach and being more mindful of my orthodoxies and trying to put myself in their shoes is one of the things that I took away from the course

and what I need to put into practice but that's going to take, that's a slow process…that is going to be measured over months not kinda days.

That is wonderful, thank you…(interrupts)

It's one of those things for me – you learn a lot of the soft stuff on that course . It is really important stuff..it is just trying to kinda get tangible examples of how people put that stuff into practice because not everyone is in a negotiating role and talking to a counterparty the next day it doesn't work that way so how to make it real and how to give tangible examples of how they have done that would help to bridge that gap …

[Barry: I remind him about the consent form]

Oh yeah the consent form, I will send you a fresh copy when I am off the phone

[Barry notices - Running 2 minutes over]

Great course by the way.I think it offers so much more ████████████████ For people who deal with stakeholders and understanding their orthodoxies and all that type of stuff I, which is most of us actually, it offers a lot to people outside the ████████████…by only real…you know in the first exercise, they left and in came the professionals who I assume cost much more but it is really difficult to build trust in 30 min. In order for their feedback to be built on firm foundations they need more time. It is almost a kinda tokenism and I am sure it's down to a cost thing – you either go the whole hog and eat the cost and that is possibly why people don't follow up with them after the event because 30 minute is not enough time to build trust and for those people to know where you are coming from.

Good stuff. Thanks.

Appendix K : Initial coding for mini-interviews

Codes 1

Remember area of focus (yes/no) [how do I determine?]

- 1.1   Yes
- 1.2   Yes
- 1.3   Yes
- 1.4   Yes
- 1.5   Mixed
- 1.6   Yes
- 1.7   Yes
- 1.8   Yes
- 1.9   Yes
- 1.10   Mixed/No **Delay**…[**big laughter**] [indistinguishable] I think it was about time pressure and how to make a balance. Wow. I am bad, I totally forgot what I wrote down. [unclear]
- 1.11   Yes
- 1.12   Yes
- 1.13   yes
- 1.14   Kinda
- 1.15   Yes
- 1.16   Yes
- 1.17   yes
- 1.18   kinda/no [Laugh] Actually I was going to look that up and see what it was [More laughter] because I don't remember. I actually had in the run up to the class [hesitation] the quality of the interaction with stakeholders –
- 1.19
- 1.20 Yes

Note the largest theme re temporal shock in Yellow
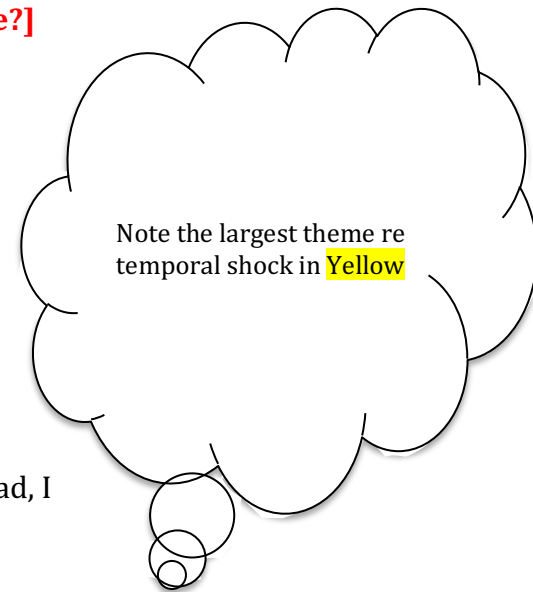
Practice ranking

- **1.1**
- **1.2**   So I would say **50% right now**. (CONFUSED)
- **1.3**   **(low)**
- **1.4**
- **1.5**   N/a BUT not satisfied (min 3, possibly 2)
- **1.6**
- **1,7**
- **1.8**   **Missing (**
- **1.9**
- **1.10**   **(adjust down to 4)**
- **1.11**   How would say 2 – quite satisfied.
- **1.12**

- **1.13** ▮▮▮▮)
- **1.14** ▮ **(questionable – reverse to mean so '3')**
- **1.15** ▮**?** Yes there is always the opportunity to refine and improve. I would say that I am in the upper end.
- **1.16** ▮ How would you rate yourself now? I would say 2 now, As time goes on life gets in the way but it was a very valuable experience and I want to keep it as a priority.
- **1.17** ▮
- **1.18** ▮ – cannot be
    - I WOULD say ▮▮, there were a lot of very valuable learnings from this (LINE BECOMES INADUBILE) and I feel that one of the biggest was taking the time to think about it and **contemplate what is the best action before taking action and with the backlog coming back it was just take the action – take the action** . I think I am very committed!
    - **The backlog forced her into unreflective task mode**
    - **She cannot see the basic inconsistency in what she is saying**
    - I would probably give it around a 2, because I have not had enough time, if things had not been so hectic when I came back maybe I would be a little further along by now
- 1.19 ▮
- 1.20 ▮ – Question this!

Implicit time recognition

- 1.1 Wonderful data
    - First of the *hard to get calls*
    - Almost immediate response on a Saturday Morning (e-mail trail)
    - Note when 'interview' took place (Sunday)
- 1.2 On golf course with clients.
- 1.4 I promise that I will not stay more than 10 minutes – **firm ok in response**
- 1.5 I am sorry for hounding you.
- 1.6 On a mobile in Sweden
- 1.8 Apologies for the delayed response. The course was intense but this week has proven to be even more intense ! Back to reality after a week on XXX…I hope that your week end/week in Ireland was more pleasant than mine !…I am working from home without immediate access to printer/scanner so can't formally respond but I am happy to participate. I am on leave next week (which is also why this week was so busy) but happy to be contacted once I get back.
- 1.9 If there is anything please don't hesitate Barry. If I did not reply to your e-mail it was because it was **hectic.**
- 1.10 Could only fit me in for **15 min** (14:45 – 15:00 Bejing time)
- 1.10 I am ok. I would like to have a good long conversation with you, say half hour, one hour but we only have quarter so please ask me your questions (I think)

- 1.11 Bank holiday in Budapest. I was telling my wife that you would be on time. public holiday – revolution against the Russians in 56
- 1.11 I have promoted it to many of my colleagues and have told them they should go. It was a positive experience but a bit long. I don't know why but these are always in September and November – we can never go to a training earlier in the year when it would be a bit easier, less hectic. Always the same at the end of the year when everybody is extremely busy.
- 1.13 Felt I had too much time but could not use it
- 1.14 Sent meeting request for 10 min with a 5 min buffer. And then was 4 minutes late. Just under 8 minutes in total. Hey Barry – apologies I missed the reminder. Looks like the buffer was worth it.
- 1.15 8 minutes late – my call before this ran over a bit, I am sorry...I have actually added the other time zone in my calendar because my boss is over there so often it gets so difficult to figure it out **...**We are fine. I know that I am too accommodating but we have the proper amount of time.
- 1.16 He dialled in 2 minutes early (06:58) **Highly motivated case/individual**
    - **Time:** In the office by 07:00 XXX – need to *beat the traffic* and be home for the children (to put his children to bed at 19:30) and not staying in the office after 18:00
- 1.18 No problem the timing works better as I do not have a ton of mornings free
- **1.20**
    - **Problems setting up the interview (getting the date wrong by a week though stated on an e-mail)**
    - **Calling and say that in a meetings (on the wrong date)**
    - **Late by 15 minutes for the call**
    - **Call lasted 11.33**
    - Sorry I missed the earlier part I was in another meeting, I had to run back to call you...
    - ME. Thank you I will keep you for maximum ten minutes
    - That is good. Let's quickly do that.

The thought bubble contains: 1.20 below is an example of incorporating my notes in the coding
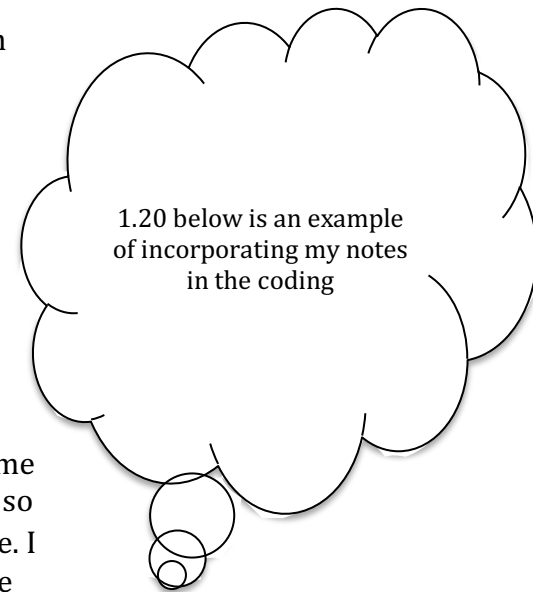
Away from the office (disruption?)

- 1.1 The theme around **catch-up**. Just before doing XXX I did another training program at INSEAD so I was back-to-back for almost 2 to 3 weeks I was out of action or not really (?) action so there is a lot of catch-up.

- 1.2 So **I took a week off** after the course and I was back this week 'catching up' and I still want to do this because I really need time to reflect but I have not done that yet.
- 1.4 so since I have been back from the course I have been almost **every week on the plane**, traveling as well which doesn't particularly help, let's put it that way!
- 1.5 No problem, I have been traveling for work quite a bit and on holiday so have been quite hard to get a hold of.
- 1.5 So when I did get back to work I immediately got back on a plane and got back to Holland for a workshop for 2 days –
- 1.5 Then the next week I had a normal week in the office and then did **the otherXXcourse the following week and then a week on holiday, back for a few days and then went to India so it has been very hectic and not business as usual for quiet some time**.
- 1.6 On a mobile in Sweden
- 1.6 Emmm I feel I am only back after the program as I went on holiday for three weeks so I have just returned…that is something that hinders a little bit I must say because the course is quite intensive and it gets really into your head and I must say during the first week of my holiday it was really in my head and I was thinking about the things that we had done, you know you try to rationalise it, order it, sort it, what are the conclusions and I don't know if that was a positive thing or a negative thing I don't know but that was the impact that it had immediately .
- 1.9 RETURN TO THE OFFICE …happened I was forced to take the earliest flight that I could find (which was on Saturday morning) and arrived here on Sunday afternoon, jetlagged obviously and the next day **8 AM start** and as you know I am working for x, one of the most hight profile projects we are doing…**shit-storm comes down**
- **1.10** Wow. Because before the training I was traveling in China for my project and then after the training I took one week off annual leave so I was gone around three weeks and there was lots of workload when I came back, there was lots of stuff to complete on my desk but now I am ok after a few weeks time.
- **1.13** What was it like after your returned from the program? Been out for the week and I was off for a week before that. When I got back to the room in the hotel, this is what you have to do. They had drafted the emails for me so I did not fall that far behind. There was one blocker and my boss said you need to send this – he drafted it for me and I sent it!
- **1.20** Aaaah …because I stay a week more in NL after the training catching up with a lot of my counterparties. Immediately then the day afterwards I was off to meet my technical team in X so I have been practically **away for 3 weeks** and then when I came back finally to work so I been practically away for 3 weeks and then my the time I came back finally to work **workload has galloped**…but that is not just the training because I was traveling for 3 weeks **back to back**, back to back and of course work had galloped and also the portfolio I am handling which is a bit heavy. **Things have piled up.**

Program overload [dilute the message]

- 1.18 And I almost felt that that came because I am preparing for another class that I am scheduled to take (MIBR). it is a two day class net week and last week I was working on the prework for that and this was the first time that I had a breather to think about that – like OH YEH!(LAUGHTER)
  - o **Came from a moment of forced reflection**
  - o **HOW IRONIC – another course**

What Barry said would happen

- **1.1   As we anticipated** it is not easy to go back to work and remember all these learning moments or commitments when you go back to the action and the projects etc etc but what I manage to do is to remember a least three or four moments where I say 'hey', take a pause instead of being pulled into the detail but I would have hoped for more moments like this but I think it is a good start…

Aspiration (to a future commitment)

- 1.2   probably rank myself a four because I am still hopeful that I will get to do it this week. I am quite optimistic. I have also told my staff as I want to tell a lot of people in order to make myself accountable.
- 1.2 At least I know what I have to do – **The first step – I may not get to step two** but I have a very clear idea of what I need to do. The other thing is that coming to end of year discussions and I am trying to apply the same lens to them in terms of how they relate to stakeholders.
- 1.3 Absolutely. It has been very difficult to find the time. Normally it would not be this bad but it is just that we are undergoing a reorg and a load of staff issues that this **takes priority**. (NB)
- 1.3 No definitely committed I have a deal to close over the coming months and it is the perfect opportunity and yeh we are a bit further down in the deal then the earlier stage when it might be easier to have those introductory, exploratory conversations about what matters to you etc and where are you coming from. But I guess it is never too late. So no, Highly committed. I don't know if it is a 1 or a 5.
- 1.5 I feel I have the tool kit to play that role if and when the opportunity comes along.
- 1.8 He was very confident (too) that he was not falling into orthodoxies Considered himself still very committed
- 1.9 I did not have time to do anything content wise (NB) but the thought is still there, the reminder, don't jump in there stay back, it is a bit of an art of not diving in and holding back before you do that. Still there!
- 1.10 **Very good question**. I think that I have been **fire-fighting** and **I don't think I have applied those behaviour changes** but I have the structure of a plan, of upcoming activities and I do think that I apply.
- 1.20 **NB It has not all been applied (not a lot as it is) but I could see it being applied in due course and the cognisance is there so I would give it a high score – 4.**

- 1.19 A lot of what I have wanted to do was in relation to external stakeholders and I have already been in front of a few, and **there will be more coming up next week (intention)** so this will a good opportunity.
- 1.19 For me the commitment is all about belief. These simple points I can see the effectiveness, I really do believe in them and I have dealt a lot with stakeholders. For me the commitment is fully there. There will be people of the course, maybe even myself who have written something down but did not try believe in them and I would say there would be zero commitment. I forget them and move on.

Golden hour [specific mention or/and the 'loss' of that period]
- **1.7** I can see that it has definitely improved how I interact with my stakeholders, how I feel about leading deals. I hope that this continues as time goes by but I have seen that change already.
- **1.16** 1.16 Quite satisfied now but I do worry that I may be worn down through frustration that 6 months from now I don't see a change in my ability to be a BOM, and 12 months from now I have a feint memory of the **energy and how excited I was going to be how things** would pan out and a year later my role and what I have been able to accomplish has stayed the same. I would say 4, as been very satisfied because I have been able to have a very serious conversation and the course really helped me to do that. **ROLE of FUTURE TIME**
- **1.18** So I feel like especially on the way back thinking thru a lot of the lean in/lean out, taking that time to think things thru…is it a good fit for the strategy and all that. More like then coming into it and, **OH MY GOD (emphasis) I am behind and working thru the backlog** and whatnot and it was probably just last week that I thought about the program again [nervous LAUGHTER] because I feel that there was, it wasn't that nothing happened while I was on it but that **it all got put on hold while it waited for me,** I don't know if I came in from the program with the same momentum because you come back and you wind up j**ust kinda scrambling** but last week when I thought about it we were kicking off a new project so aligning with stakeholders early and separately and I did do that last week to kick off the relationship side to (overcome) the problems we have had in the past. **Golden hour (+1) – getting over the hump**
- **1.20** I've been practically away for 3 weeks and then by the time I came back finally to work **workload has galloped**…but that is not just the training because I was traveling for 3 weeks **back to back,** and of course work had galloped and also the portfolio I am handling which is a bit heavy. **Things have piled up**

Routine (and habits)

- **1.4** Oh well? [Laughter] I would say that the **attention has gone down a bit**, it has just been a **very very busy schedule** so after some time it became a question of falling back into the **old rhythm** of getting **trapped in your day to day rhythm**

- **1.15** Oh yes, If I am given an **opportunity** to learn something I want to try get maximum benefit from it. There are some thoughts out there that it takes a while for **things to become second nature, repetition**
- **1.16** Usually a little frantic for the first day or two – anytime you are away for a while, be it a business trip, a course whatever. **That is the (bubble) challenge right**. What we learned on the course when we are under time pressure we fall back on the old habits but it is these **old habits that cripple us so.**

Thinking and doing (note re reflection)

- 1.1 Interesting is that this is the weekend when **I have time to think** and the moment etc if you ask me now I am as committed as ever to those things that I put forward for myself so I would give myself 4-5, a very high score. But I think if you were to ask me in the middle of things when we are busy with things and we are squeezing to find 10 minutes, whether during lunch-time or between meetings to do this I may not a score as high.
- 1.2 The other part that I have not been able to do was I would spend more time **reflecting** and I marked my calendar to do this on Friday but I ran out of time. Maybe because it was my first week back.?
- **1.3 I am trying to think** if there were even opportunity to apply the learnings from the course in this situation but it is unlikely that they will stay in (Company) so it is trying to figure out what they will do next, what are their skills and what happens next. There may be an opportunity in the coming engagements but the first engagement is all about whether I am going to lose my job, tears and all that stuff. Er so maybe going forward I can…(inability to think) Em. It is a bit like you get sucked in. YOU get sucked in.
- **1.4** Oh well? [Laughter] I would say that the **attention has gone down a bit**, it has just been a **very very busy schedule** so after some time it became a question of falling back into the **old rhythm** of getting **trapped in your day to day rhythm**, getting **trapped in your traveling…**
- **1.5** I did think of you at that time and clearly something did brush off over those days…
- **1.5** I guess I go back to what I said at the start I came out of the course feeling quite good and these behaviours are ones that I felt that I exhibit anyway. I stiil do what I used to do which is to use many of these behaviours anyway (Laugh) **I haven't over the last few weeks been consciously reflecting back** to course and thinking can I introduce this element into this particular situation but hopefully I was using some of those before and continue to do so .
- **1.15** if I came back and did the exact same things in the exact same way it would be a waste of money so you have **consciously** do this, thinking about each engagement and thinking what do I want to get out of this
- **1.15 I think (me – AND ACT) about it every day**. What am I doing and how is it impacting the group? Am I coming to these meetings…am I focused on what really needs to be done. One of the things that I have

been told since I have come back has been that I really need to work on my enquiry skills, to understand what really matters to the person or organisation I have been dealing with so as I have gone thru all of the engagements that I have been in (I had an interesting example of this yesterday with somebody scheduling a workshop for a whole day and I am thinking I don't know what we really get out of this, what does success look like after we finish this day so I am really providing some respectful challenge of the team as to why we are bringing in external consultants for a 'problem' I truly don't believe we understand, there needs to be more enquiry and due diligence. So that is how I have taken what I taken from this and how I apply it. When I went to the training I was not sure what we were going to but I knew that I wanted to focus on how to get value and it was really different from what I expected this is helping me. as I move into my new role I can see that I will use these in a different way'

Acting differently

- 1.6 ALSO
- 1.7 No no , in fact I think I have been able to have conversations with counterparties and approach those conversations a lot differently so I think that in that way I think that I have been able to practice those things that we talked about in the course.
- 1.12 I have been able to put that into practice and have been **doing it consciously** over the last few weeks and I have had quite a few opportunities particularly because we have had a number of changes in terms of how we are presenting (the advisory committee meeting presentations) and the government here has split its role as a NOC into the regulator, and they are managing this meeting. And what I have been able to do since I have been back has been to work with the NOC to co-create what goes to this meeting and in fact s part of that process it was
- 1.12 AFORDANCE I have been able to maintain focus very well. I do wonder however if it is to do with the fact that I have been given a **perfect opportunity** to allow me to test it. If I was in a different role or a different phase of the year I may not have had the opportunity to test it so quickly, and as effectively as I had.
- 1.13 Very happy with his progress. Pretty satisfied. I got it done (laugh). I was just lucky. There was some half-day workshop and I was fifty-fifty as to whether I would go and I practiced some of the things so it was good timing.
- It has continued (New Energies and digital) . why don't we put this on an app and others are running with it. Jobs done and I don't have to do it.
- 1.15 Oh yes, If I am given an **opportunity** to learn something I want to try get maximum benifit from it. There are some thoughts out there that it takes a while for **things to become second nature, repetition** ...if I came back and did the exact same things in the exact same way it would be a waste of money so you have **consciously** do this, thinking about each engagement and thinking what do I want to get out of this, what does she want to get out of this. I really wish I would have had this

earlier in my career as it would have helped me with my EVP relationships but we are where we are today and I am going to use these going forward.

- 1.16 So my challenge has been changing my own behaviour. I see the question more as 'How successful have you (I) been at changing your (my) own behaviour?' You say apply learnings. **I say change behaviour'**

Volume of (temporal) onslaught/shock [NB define temporal] [nature of the words]

- 1.1 The theme around **catch-up.** Just before doing XXX I did another training program at INSEAD so I was back-to-back for almost 2 to 3 weeks I was out of action or not really (?) action so there is a lot of catch-up.
- 1.1 The other is **busy**. I have two other team members that is scheduled to go on leaver so there is a lot of scrambling in the team.
- 1.1 But I think if you were to ask me in the middle of things when we are **busy** with things and we are squeezing to find 10 minutes, whether during lunch-time or between meetings to do this I may not a score as high.
- 1.2 The other part that I have not been able to do was I would spend more time reflecting and I marked my calendar to do this on Friday but I **ran out of time**. Maybe because it was my first week back.?
- 1.3 NOT greatly satisfied. I would probably give it around a 5. And that is mainly because I have been **busy** with a reorganisation as opposed to working on a deal. So I have been **distracted** by other type of work and I **have not taken the time** to sit with our stakeholders and understand their drivers which was what I wanted to focus on. I will get a chance this evening as I am taking them out but I could do a bit better.
- 1.3 Em. It is a bit like you get **sucked in. YOU get sucked in.** You are dealing with people issues, and staff losing their jobs and their emotional well-being and this well-being becomes their first priority.
- 1.4 Oh well? [Laughter] I would say that the **attention has gone down a bit**, it has just been a **very very busy schedule** so after some time it became a question of falling back into the **old rhythm** of getting **trapped in your day to day rhythm**, getting **trapped in your traveling**, so since I have been back from the course I have been almost **every week on the plane**, traveling as well which doesn't particularly help, let's put it that way!
- 1.5 Then the next week I had a normal week in the office and then did **the otherXXcourse the following week and then a week on holiday, back for a few days and then went to India so it has been very hectic and not business as usual for quite some time**.
- 1.6 Emmm I feel I am only back after the program as I went on holiday for three weeks so I have just returned...that is something that hinders a little bit I must say because the course is quite intensive and it gets really into your head and I must say during the first week of my holiday it was really in my head and I was thinking about the things that we had done,

you know you try to rationalise it, order it, sort it, what are the conclusions and I don't know if that was a positive thing or a negative thing I don't know but that was the impact that it had immediately . When I returned last week…emmm…(hesitation) some of the things had slipped I must say because a lot of other things happened in between but what I think is a challenge as always the work space is quite hectic and a lot of things are happening so it takes **discipline** to make sure that you have the time to apply whatever it was you said you would do when you were writing your plan. In my mind my original idea was that before I go on an engagement I was going to **sit for a half an hour** – what is my story, what am I going to say, how will I approach it what do I want to take away from it and in practice (LAUGHTER) **it is nice to put it down**, to say it but it so much more difficult to do in practice when things happen more in a **hectic** way so that is always a bit of a challenge and I think…emmm (I DID NOT INTERVENE) **it's the time and it's the fact that the work environment is more dynamic than a very stylised exercise** …but that also makes it interesting to **reflect** on it, to think what am I actually doing and why is it so **difficult to find the time** and the structure so I think those are my main challenged… (**HUGE SO SO SO RICH)**

- 1.8 Laughter (huh huh) **BUSY**! So em I had a **crazy** week. I probably worked 50/60 hours the next week. It was very **intense**…it was back to the **rat and the wheel and spinning, spinning the wheel as quick as possible…**and this is just because it is a **very very busy period for me. Yep.**

- **1.9 (RICHNESS)** Emmm. It was a bit of a **cold shower** Barry. Yes, you go with the **best of intentions**. I think that the course was really good and it really struck me and I had a few things that I really had to take home and then what happened I was forced to take the earliest flight that I could find (which was on Saturday morning) and arrived here on Sunday afternoon, jetlagged obviously and the next day **8 AM start** and as you know I am working for x, one of the most high profile projects we are doing…**shit-storm comes down** and people ask you where you went on leave. No sympathy, no lee way and **you really get sucked in immediately** and that was even more apparent now than I have had in the past. Maybe something to do with the phase of the project but it can also be the quality of the course because **I really wanted to resist** that so what **I did I took some time out of my calendar** and I wanted to have a **conscious time to reflect at the end of each day** and I realise quickly in that week that that would not work and I did two simple things, I realised that it did not really matter what time I go to work as soon **as I enter the office (NB- VIRTUAL) I get sucked up into things** that I did not plan to do so I though the obvious solution is to go to work later and take some time off at home and take some time off before, go for coffee or something in a quite environment before I go into the office and that sort of kept me sane since'

- **1.10** 1.10 **Very good question**. I think that I have been **fire-fighting** and **I don't thing I have applied those behaviour changes** but I have the structure of a plan, of upcoming activities and I do think that I apply.

- **1.11** It would be naturally easier. 4 days is a bit difficult (I appreciate that it was 5 at some stage) to really **step out** for 4 full days. It means that I have to work through the night and try to catch up. It does not mean that life is stopping especially in this bust time of the year. So that why after these four days, even after working every night, this is quite a heavy period and I am not sure it would be possible to squeeze to 3 days and it would impact quality.
- **1.11** NOTE how many **temporal references (LITTERED)**
    - o **Calendar** effect
    - o Length of the program
    - o Need to work thru the night – how difficult is it to **step out**
    - o Inability to sit with boss – cancelled
- 1.12 That has been **a bit of a nightmare** I can say! So, even in the **days and weeks leading up to the course** I was questioning whether or not I should pull out of the course because of the critical phase we are in at the moment. What I found was that t**he time I was away** on the course there were quite a few things that needed to be done by members of the team which were **not done in my absence**, the reason being we are going to a state of decommissioning and there are quite a large number of the team that are moving on so they either have new jobs elsewhere or many have not so up to the 31 OCT as I indicated in that email over 90% of the team have left the supply base so over those last few weeks and months I guess, I think a lesson is that it is quite critical to have a person there that is actively managing the people because their moods are down and they are concerned what their livelihoods are going to be. So while I think I managed it ok I think that it did **lead to a number of delays** in areas and we did need to have to put in medium to high risk contingency plans that seem to be panning out but has **created additional stress** for many of the people involved.
- 1.14 Ummm. I think that this is **the classic revert to mean**. Ha ha! I mean to be honest Barry it has been pretty **busy** since I have been back but having said that I have gone on to a new project and I am really trying to understand the new project, what is the scope etc and the extent that I have been able to focus on this I would say that I have been fairly satisfied so maybe a 2'
    - o Lots of **avoidance** in his talking
    - o Themes. **Busy, New project** – implied **NEW priority** (no sense of how these themes **TRANFER**)
- 1.14 I think if it was 'normal' circumstances it should have been able to catch up in a matter of two or three days but this specific instance was a big jump in work load?
- 1.14 I think that different people are different. Right for me, taking the time out for the week, I tried not to do the day job while I was there so coming back was a big catch-up, so you really almost have to make up as much as you can for the time. That is the immediate climate that you come back to the office in the next day. **(Like 1.13)** 1,13 Old cliché. What you put in is what you get back. I did not take my phone.
- 1.15 (MANAGEABLE) So it was out for two weeks and my son had a medical emergency so I was out for additional days. I have had a lot of

catch up to do but I WOULD NOT attribute the catch up to do as a function of the course. My in-laws' house flooded. But it is all Good, all good...

- o **TO what extent is changing jobs impacting this**
- o There has been extra work but no more than what I would expect from an extended period

- 1.16 Usually a little frantic for the first day or two – anytime you are away for a while, be it a business trip, a course whatever. **That is the (bubble) challenge right**. What we learned on the course when we are under time pressure we fall back on the old habits but it is these old habits that cripple us so.

- 1.18 I would probably give it around a 2, because I have not had enough time, if things had not been so hectic when I came back maybe I would be a little further along by now

- 1.18 So I feel like especially on the way back thinking thru a lot of the lean in/lean out, taking that time to think things thru...is it a good fit for the strategy and all that. More like then coming into it and, **OH MY GOD (emphasis) I am behind and working thru the backlog** and whatnot and it was probably just last week that I thought about the program again [nervous LAUGHTER] because I feel that there was, it wasn't that nothing happened while I was on it but that **it all got put on hold while it waited for me,** I don't know if I came in from the program with the same momentum because you come back and you wind up j**ust kinda scrambling** but last week when I thought about it we were kicking off a new project so aligning with stakeholders early and separately and I did do that last week to kick off the relationship side to (overcome) the problems we have had in the past. **Golden hour (+1) – getting over the hump**

- **1.18** Would it be fair to say, and I don't want to put words in your mouth, but reality hit you **(YES!)** and it was only when that fog began to clear that some element of focus come concerning that behaviour **(ABSOLUTELY)**

- **1.20** I been practically away for 3 weeks and then my the time I came back finally to work **workload has galloped**...but that is not just the training because I was traveling for 3 weeks **back to back**, back to back and of course work had galloped and also the portfolio I am handling which is a bit heavy. **Things have piled up.**

- **1.19** . For me what was particularly difficult there was a lot going on while I was on the program, agreements that my team were negotiating while I was away, BOMs were also running some of these projects and I felt disconnected. Now how I made up for that was early mornings and late nights so what it did for me esp since the ME weekend is on a Friday/Saturday and the workday staring on a Sunday I ended up working 6 days a week, very long days. **At least 3 hours before the course started and at least 3 hours after the course where I would be in our offices or in the hotel room. I managed it by pulling longer days but there was no doubt that I felt the 'pull' to come back into Qatar and get things done.** Now if I thought that it followed a more regular schedule I think it would have been more relaxed because I have

<mark>a solid team and they do know what they are doing. But given the heavy workload of that period it was a real stretch.</mark>

- <mark>When you then came back on the following Sunday? I don't think there was a 'mountain' (my unnecessary prompt) <u>this was mitigated by **stretching the days** out longer</u>. And if I go to a more normal scenario, without the long days, I think I would have been ok. Under 'normal' circumstances it is fine and people should be able to react more efficiently in terms how they do things.</mark>
    - <mark>What is **regular? What is normal?**</mark>

Workload

- 1.1   My reflection on hearing on what you say is that a lot of us are in high-octane, fast paced jobs and situations day in day out and the amount and quality of think time is challenging. So for example I have the first hour of the day blocked out where no one disturbs me but I realise that that 1 hour is very difficult to protect because I have people coming over to me and saying X, I really need to talk to you at 8 AM tomorrow. Can you try to make it? The moment that I start to give up that time the amount of thinking time that I have becomes very limited and let's say after work there is the family and the social aspect that needs to be looked after so the amount of time that I have to step back is getting more and more challenging. (Sacred time)
- 1.1   And with digitization it is becoming more challenging. The minute I log on people know that I am online and they come to my desk, the open office concept, they will ping me or give me a call – can we talk, stuff like that. There is nowhere to hide.
- 1.7   It was relatively easy to slot back in because I was also working while I was on the course in the evenings and so I did not have to disconnect. How much time to stay connected? 1 to 2 hours a day.

Unusual times

- 1.14 I think if it was 'normal' circumstances it should have been able to catch up in a matter of two or three days but this specific instance was a big jump in work load?
- 1.18 I would probably give it around a 2, because I have not had enough time, if things had not been so hectic when I came back maybe I would be a little further along by now

Role of meetings

- 1,13 Old cliché. What you put in is what you get back. I did not take my phone.

Role of email

- 1.6 Consent form. When was that sent? yes please I have a **huge backlog** on my e-mails so it would be easier for me if it was **top of the pile**. **What get dealt with is the most recent (recency)**

Role of calls (Multi distraction)

- 1.16 I tend to be good in meetings but I tend to get really distracted on calls like this as I get distracted as e-mails come in and things happen. I am better but I am not as good as I can be about blocking out **distractions** on calls like this. I am going to continue to work on that

Quality of time

- 1.1 Interesting is that this is the weekend when I have time to think and the moment etc if you ask me now I am as committed as ever to those things that I put forward for myself so I would give myself 4-5, a very high score
- 1.3 Emotional losing job time

Role of others - post-program bubble is burst

- 1.9 people ask you where you went on leave. No sympathy, no give and **you really get sucked in immediately** and that was even more apparent now than I have had in the past.
- 1.11 What I found was that t**he time I was away** on the course there were quite a few things that needed to be done by members of the team which were **not done in my absence**, the reason being we are going to a state of decommissioning and there are quite a large number of the team that are moving on so they either have new jobs elsewhere or many have not so up to the 31 OCT as I indicated in that email over 90% of the team have left the supply base so over those last few weeks and months I guess, I think a lesson is that it is quite critical to have a person there that is actively managing the people because their moods are down and they are concerned what their livelihoods are going to be. So while I think I managed it ok I think that it did **lead to a number of delays**
- **1.13** What was it like after you returned from the program? Been out for the week and I was off for a week before that. When I got back to the room in the hotel, this is what you have to do. They had drafted the emails for me so I did not fall that far behind. There was one blocker and my boss said you need to send this – he drafted it for me and I sent it!
- **1.16** I would say possibly once a day. I made a point of sharing the pre-videos with my team. There are 5 people who work with me. I shared these along with sharing my own orthodoxies and asked them to help me – I fell like I am trying to be mindful of this. Support material (orthodoxies videos)

- **1.19** It was good to be back in. There was **relief in the team to see me face to face** after a long time away but aside but not that I can home to a whole heap of work. (Link)

Positive initiatives

- **1.1** but what I manage to do is to remember a least three or four moments where I say 'hey', take a pause instead of being pulled into the detail but I would have hoped for more moments like this but I think it is a good start...
- **1.2** he is very supportive and he did XXX a long time ago. That was very helpful.
- 1.6 What I think is quite positive is the name that the course has with senior managers so they think very highly of, they take the coaching , and for the plan very serious so I find that quite positive so they provide you with the room to apply it . That is basically it.
- **1.6** There is an interesting **role for the line managers** once again. It gives some pressure that your line manager or whoever is your coach is going to ask you in two month's time what did you do with this, it was an expensive course you better make sure that you got something out of it and if you know that the question is on the horizon it give the additional incentive to keep thinking and applying it.
- **1.6** Yes. a lot but that is also because the behaviours that I chose which were involved with external engagement and there have been sufficient **opportunities** to apply that and I don't see that as an issue...and you chose something that is relevant not something that you can apply every three months. That is not much use. (COMPARE TO 1.5)
- 1.9 I did two simple things, I realised that it did not really matter what time I go to work as soon **as I enter the office (NB- VIRTUAL) I get sucked up into things** that I did not plan to do so I though the obvious solution is to go to work later and take some time off at home and take some time off before, go for coffee or something in a quite environment before I go into the office and that sort of kept me sane since'
- 1.9 I think it is still there. **I really take time off to look at my calendar** and see what I want to get out of my day. I have been a bit more technical about these things. If I relate back to my pledge ta the end of the program I did plan a few meetings with people I am not close to and forced myself to be curious and I think it kinda like a small angel or devil on my shoulder reminding me. It is still there, and **what is it 3 week I think that that is pretty good.**
- 1.11 What I could not achieve is to is that I had booked time with my line manager to discuss this and again because of the business priorities it was cancelled so I could not even talk to him about the program however I talked to Clare – we had a half an hour chat and it was good focusing on two real examples. I still try to remember for those stuff.
- **1.16** I would say possibly once a day. I made a point of sharing the pre-videos with my team. There are 5 people who work with me. I shared these along with sharing my own orthodoxies and asked them to help

me – I felt like I am trying to be mindful of this. Support material (orthodoxies videos)

- **1.16 I want to continue to have touch points. I have reached out to Deb and we are working to set that up.**
- **1.17** I felt a new sense of **energy and purpose**. And, um, I think that I felt like I had a better **vocabulary** to discuss leading a XXX deal with my manager and also even understating better my peers in other groups and that this gives me the vocabulary to know where they fit in things.
- **1.17** One final question re commitment. It is still quiet high and as you go into period 4 you end up doing you GPA close out and what I was able to accomplish and building what I will so for next year and I feel lucky that I did it in October. **Coincide with GPA – compare to Lajos**
- **1.17** A good extent. Interestingly enough it has dovetailed with the **people survey** for (this area) and there was a report back on our leader and the dynamics of our group and then there is my personal assessment form XXX and what I am trying to achieve. And it is an excellent opportunity to address some of my gaps within the context of what is happening in our group.
- **1.18**
- I think what would have helped would have been if I had taken a picture of the how, what…whatever and PUT it in my calendar {LAUGHTER} once a week just remember this as a refresh. **Intentionality and related to TIME and the role of the calendar**

Positive about the program

- 1.6 What I think is quite positive is the name that the course has with senior managers so they think very highly of, they take the coaching , and for the plan very serious so I find that quite positive so they provide you with the room to apply it . That is basically it.
- 1.7 I really did enjoy the program and I think I was able to take away from it quite a few things that I can literally apply in practice.
- 1.9 and that is what I wanted to convey to you. That is really strong. I don't know how you pulled it off but in those 4 days made that really clear to me if I want to develop this is not about doing more but about doing less and doing it better and a lot more deliberate. that really helped. It is really with me.
- 1.11 And as I said to you it was one of the few XXX trainings I liked. Normally I am very sceptical. Especially the benchmark with the previous one was horrible (MIBR). I have promoted it to many of my colleagues and have told them they should go. It was a positive experience but a bit long

- Big focus on cost – he came from a █ background and is not used to this (cost of travel and then cost of program). This accounted for a sizable amount of his manager's budget for the year. Had been at XXX for 23 years.

- Conscious that the world is changing and we need to come to the EAST. Might that work with the ███ ?

- 1.20 I really liked the practical aspects of the course> I give you an example. The things that really resonated with me. The ███ guy – who do you play emphasis on and why? And also using the time in a meeting as best as possible. You start to take it for granted. Step back. This is very valuable. planning small talk. It has a little effect but when you add it all up it has a big effect. This is what I have taken away. Some I have used (already) and some will be used over time. It is the refreshment of the cognisance that you lose in the day-to-day. The other element is that so much becomes instinctive. That is good. Keep it instinctive but you need to highlight these things to give them relevance.

Energy

- 1.1 For myself when I came back after the course I felt **energized**, recharged, the feeling is that I am armed with new skills to want to do it. But of course, as I say in the course of the last two weeks there are ups and downs. I feel positive when I feel a change in myself but very often I catch myself in the usual stream of things.
- 1.2 I felt very good returning. Two weeks without children was great. I feel quite **empowered**. This is no BS because I am talking to you.
- 1.4 Eeem…(pause)…it was…I felt very **energised** after the program, coming back to work because I think the program itself focused on behaviours, not really on a lot of content and it was really good to take the time out to reflect and think and then coming back on the Monday morning **felt very energised, full of new ideas and things that I want to change**… **[this was where she was going to end] – BALANCE Then look how life took over!**
- **1.4** Me putting words in mouth but 'the rhythm of everyday life acts as a distractor once the initial energy wanes' **yes that is definitely true**
- 1.5 I don't normally travel (wha??). I must say that coming out of the course, maybe I am not answering your question directly **I actually came out of the course feeling quite good about myself.** The feedback from the people on my team and the feedback from the coach was that whilst you were not the ███ in the exercise you were exerting a lot of leadership on the team and direction and lots of support for the ███ and that is how I operate day to day so I came out of the course feeling that I don't need to change that much and that my role in leading deals is more of a subtle approach and that suits my personality anyway and I actually came out feeling quiet good and that I should keep on doing the good stuff I was doing already instead of making big changes to the way I behave. (**BALANCE**)
- 1.7 I think I came back feeling a lot more sure and confident in myself and with a clear idea of what can make my deals work better going forward.
- 1.16 quite satisfied now but I do worry that I may be worn down through frustration that 6 months from now I don't see a change in my

ability to be a BOM, and 12 months from now I have a feint memory of the **energy and how excited I was going to be how things** would pan out and a year later my role and what I have been able to accomplish has stayed the same. I would say 4, as been very satisfied because I have been able to have a very serious conversation and the course really helped me to do that. **ROLE of FUTURE TIME**

- **1.17** I felt a new sense of **energy and purpose**. And, um, I think that I felt like I had a better **vocabulary** to discuss leading a XXX deal with my manager and also even understating better my peers in other groups and that this gives me the vocabulary to know where they fit in things.

Awareness

- 1.1 For myself when I came back after the course I felt energized, recharged, the feeling is that I am armed with new skills to want to do it. But of course, as I say in the course of the last two weeks there are ups and downs. I feel positive when I feel a change in myself but very often **I catch myself** in the usual stream of things.
- 1.7 What I say is that I am a little bit more aware and conscious of the interactions, the body language, what people say. It has made me a lot more aware.
- 1.9 I think that the course was really good and it really struck me and I had a few things that I really had to take home
- 1.9 I ref the little devil with the fork on the shoulder.
- 1.12 I have been able to put that into practice and have been **doing it consciously** over the last few weeks and I have had quite a few opportunities particularly because we have had a number of changes in terms of how we are presenting (the advisory committee meeting presentations) and the government here has split its role as a NOC into the regulator, and they are managing this meeting. And what I have been able to do since I have been back has been to work with the NOC to co-create what goes to this meeting and in fact is part of that process it was
- 1.15 **Returning to work I had a new openness and awareness** as to how people view me and how I am present in the room and having that awareness has helped me in the meetings that I have been in. Since then we have also had IPF feedback – our performance feedback – it has opened my eyes quite a bit. One of the things that the coach told me my boss told me I don't see that, I have worked with you for two years you may appear anxious but I think that that is just body language and movement and it is one of the things that you need to work on but it is sending the wrong messages, someone might think you might not know your stuff because of how you fidget. OK that is fair I own that. Now that it is **awareness** of it I try not to shake so much. I am nervous, lots of energy…

Places to reflect

- 1.1 Interesting is that this is the weekend when I have time to think and the moment etc if you ask me now I am as committed as ever to those

things that I put forward for myself so I would give myself 4-5, a very high score

- 1.8 Applying. It still there in the back of my mind. The one think that I said that I would do to help with this was to go out to reflect for a coffee on a Friday, get away from my desk, that I clearly have NOT been able to do yet but it is still there [END OF RECORDING]
- 1.8 Tends to <u>reflect</u> in the shower at the end of the day or over the weekend – cannot happen at work!
    - People do <u>not</u> have what they would describe as the ability to reflect at work e.g. they may be reflecting in action but not recognised. What is recognised is falling back into routine/habits.
    - <u>NB</u> Wilbert changed his environment/context and created a new routine – to a certain extent Romain did the same
- 1.9 **I really wanted to resist** that so what **I did I took some time out of my calendar** and I wanted to have a **conscious time to reflect at the end of each day** and I realise quickly in that week that that would not work
- 1.9 I did two simple things, I realised that it did not really matter what time I go to work as soon **as I enter the office (NB- VIRTUAL) I get sucked up into things** that I did not plan to do so I though the obvious solution is to go to work later and take some time off at home and take some time off before, go for coffee or something in a quite environment before I go into the office and that sort of kept me sane since'

Getting someone wrong (me)

- 1.6 For someone so quiet and unassuming on the program yet there were so easy to talk to, and open afterwards _ **BOTH HUGE REFLECTORS**
- 1.9 Got him wrong – leaving in the evening and not saying good night

Nature of the business

- 1.1 My reflection on hearing on what you say is that a lot of us are in high-octane, fast paced jobs and situations day in day out and the amount and quality of think time is challenging.
- 1.4 I have been back from the course I have been almost **every week on the plane**, traveling as well which doesn't particularly help, let's put it that way!
- 1.16 I explained to my boss that they put is in these roles and **there is no support**. As an example I was arranging a negotiation between various/multiple parties (internal and external) who were coming in to visit us, with lawyers [This past Monday] you have to do everything from soup to nuts. All bring lawyers and advisors and I am arranging can we get a room, someone to do the catering . I am putting together the agenda and arranging the briefings, questions, researching. How do you lead a deal when you have to do the logistics, when you don't have junior support. How can I get to a senior strategic level without that? That is

epidemic here. They want us to lead but at the same time the want us to do our own expense reports and cater meetings.

Focus on the present

- **VERY poorly I would say. Yes, quite frankly. You are thinking about getting through the day {small laugh], achieving goals apart from maybe how you achieve them.**
- **1.8** Does it work for you now. Yes – but hesitation as he is waiting for another call
- **1.8 Acts as a micro-example of the type of pressures. This did not inspire me with confidence. 'I emmm…I may…I am still trying to reach another colleague…but he's not around so I have time ' [I suspect that he was looking to see if he was online as he seemed distracted when talking with me]**
- **1.10** Can you say a bit fire-fight? Back to our first conversation about **time pressure**. I have to quickly finish what I am doing and send it to everyone.
- **1.18** I WOULD say one, there were a lot of very valuable learnings from this (LINE BECOMES INADUBILE) and I feel that one of the biggest was taking the time to think about it and **contemplate what is the best action before taking action and with the backlog coming back it was just take the action – take the action** . I think I am very committed!
- **1.18 OH MY GOD (emphasis) I am behind and working thru the backlog**

Best of intentions

- 1.9   Emmm. It was a bit of a **cold shower** Barry. Yes, you go with the **best of intentions**.
- 1.18 And I had already had a set up the meeting before I left to have a meeting with my manager when I got back and that really helped to talk thru what I got out of it and what I intended to do and somebody to hold me to it and certainly I will go to talk about it again but I will say it again it was more **about scrambling to get caught up** so it was really only last week that (inaudible on line) so I must say having a touch point with the manager or having a calendar hold time in the future, once a week to take a breather
- **This in intentionality. Reality has been the true test!**

Personal commitment/ATTENTION

- **1.4** Oh well? [Laughter] I would say that the **attention has gone down a bit**, it has just been a **very very busy schedule** so after some time it became a question of falling back into the **old rhythm** of getting **trapped in your day to day rhythm**, getting **trapped in your traveling**, so since I have been back from the course I have been almost **every week on the**

plane, traveling as well which doesn't particularly help, let's put it that way!

My impact (a form of programme support)

- **2.10 MY** impact on the process
  - **She says this is a huge reminder/prompt for her!**
  - Definitely Barry. I really want to do this. You call acted as a great reminder, like BING! a reminder that I should do these things. I really like it. I have remembered what it was that I wanted to achieve and it was to send an e-mail to colleagues who were on the same team to build the network and remind each other of our individual targets around changes**. (Obviously not done!)**
- 2.16 . I signed-up to study because **I need more external structure (support)** to help me hold my self-accountable. Us having these conversations helps me to do the things I need to do to get benefit from the class. NOT a hugely altruistic activity, I like research BUT.
- 2.17 The reason I am interested in having this conversation with you is to keep myself motivated and to keep assessing what I should be able to do and able to do but by keeping to do this as part of the program, whatever is in my calendar, I can get my head around it and the other stuff can flow to the bottom. **I am impacting the research process**

Change and time

- 1.12 The approach that I am taking (co-creating versus giving) does create an additional time commitment BUT it has paid off in a number of areas. I would say that it has not created a huge additional burden but I am speaking to people in our office to ensure that they are online with what I was going to try. There was push back in relation to the additional time and effort that it might take but when I look at the time it has saved elsewhere I think that I have easily made up all the additional time that it has taken. On balance it has not taken any additional time.

My learning (notes to myself)

- 1.1 Not taped
- 1.2 I speak too much – she was replying and I am speaking over her
- 1.2 KISS Difficulty answering the question ███████: reinterpreted as how have I applied it?
- 1.3 Importance of **my 'tone', my presence** on the calls – NOT reading. Therefore I was slightly different every time. The questions needed some degree of elaboration or refinement to get to a clear meaning.
- 1.4 My set-up
  - Need to say this in their **own language** (the 'stuff' that helps or hinders)
  - Be **naturalistic**

- **1.5** I waffle on too long in describing tool – *'I don't see why not!'* re the next bit! Not a ringing YES!
- **1.6** My preamble
  - Small talk (being in Sweden). Good flow of interview. Seemed ready to talk without me asking questions (almost narrative like). I was able to link more naturally to aspects he had talked about.
  - 'I would love you, *really love you* – TONE of voice – to be as honest as possible'
  - Is that OK? (And I cut him off almost)
  - Can you remind me what that was (INTONATION)
- 1.8 Turn to flight mode
- 1.9 This feels like a nice balance to the interview schedule – I have confidence. I know WHY I am asking each question. This has developed into a hybrid qual that can be done within the time. STAY quiet and let people speak
- 1.12
-   NB difficulty **dealing across cultures** – <u>use of diagrams</u>
  - Time zones (May calls at 06:30)
  - Understanding English – understating the question
  - Wanting to impress – loss of face, giving you what you want
- 1.13 THIS WAS MY FIRST interview of day
  - Too relaxed
  - Underprepared
  - Not recorded
  - His focus on the **task** not the behaviour
  - **HUGE LIGHTBULB!!!!!**
  - AM I only getting those that are committed to doing something – how do I reach the hard to get? Those that have not responded?
- 1.16 I tend to be good in meetings but I tend to get really distracted on calls like this as I get tend to get distracted as e-mails come in and things happen. I am better but I am not as good as I can be about blocking out distractions on calls like this. I am going to continue to work on that…so more a 4 not a 5. **NB – what does this mean for the product? Can I deliver it some other way – NOT on a work computer!**
- **1.17** Relaxed call late in my day

Appendix L : Reflective notes after first set of mini-interviews (Oct.)

Process of reflection (first mini-interviews) [11-23/10/2017]

Version 16/10

- Shift in my thinking that I should be capturing data on and immediately after the program (as per my original proposal)
  - Why
    - 'Golden hour'
    - Relative experience
  - What data am I looking for?
    - REFLECT: this should be close to what I am collecting as part of my technology session
  - How would I do this?

> Detailed notes to myself after the Impact Programme and ahead of first set of mini-interviews. Note concerns over how I get everyone to attend and comments re Senior Sponsor (Ziagranik effect) . Each in Yellow

- Description of setting/programme: What are the things that I take for granted?
  - Huge uncertainty ▮▮▮▮▮▮
  - Uncertainty over my sponsor (reapply for his job. Had to leave to see ▮▮▮▮▮▮▮)
  - My workload (how do I reposition this when I have a full schedule)
  - Details of the program

- What we do as part of the program to get people ready for embedding?
  - Kick-off (positioning) Pre-work and customizing to their world
  - 50% actor-led simulation based **(describe)**
  - Use of internal and external coaches – something that builds
  - 121 coaching on last day and offer to follow up
  - Calling it - language and terminology (actively forget) Realistic!
  - Specificity of To-do (from day 2)
  - Participant support (final day)
  - Manager support (pre and post)
  - CNS explanation on last day as to what is happening to their brains

- What constitutes a 'successful' event? Happy sheets. This on balance was a successful session.

- I journal my experience over the course of the post-experience (e.g. this!)

- Conscious of managing my roles I did not mention the research until after the lunch break on the final day. I had positioned in my opening at the start of the week by saying that we would like to invite people to be part of a 'parallel process' – a phrase that I repeated as part of the final session.
    - REFLECT Did I give people enough time to process this
    - REFLECT Was constantly aware of managing my roles
        - To the client. They are paying me for the program
        - To participants. They see me in a certain role and the dynamic changes when I shift modes (Now I am looking for something, does this effect the way that I interact). This was confirmed when I tried to do two 'interviews' over lunch
            - Person sitting at table, alone in the room (Canadian Female, Leanne) – Did not understand my question and I had to back down
            - **NB** More relaxed (Wilbert) who totally misinterpreted my informal request as he was walking back to the room. He misinterpreted my asking him about his engagement as related to me picking him up earlier in the morning on using his mobile in class.
    - REFLECT Did I prepare enough for positioning this – especially relative to the level of preparation for other aspects of my work on the program

- Agreed to send out consent and participant information sheet over the weekend. Did this on the Monday morning. Changed certain details from the pilot.
    - Took out title (confusing and acting as a prompt to activity)
    - Wondered about my doctoral reference – how does it change the way that I am seen with this audience? e.g. so many PhDs
    - Took out opening para (describing post event feeling) for the same reason
    - Tweaked some of the wording
    - Is there an easier way of sending out the consent form (online instead of faxing)

- Timing of the consent form (23 sent – 1 e-mail send on Thursday of that week) meant that I had a slow response rate and questioned my ability to follow up for 'golden hour' data
    - Monday 9th   sent
    - 10th   1 signed consent.
    - 11th   1 signed consent (from clarification) Indonesia
    - 11th   1 signed consent US
    - 12th   Question re stage 2 (Tanz)
    - 12th   Question re stage 2 (Canada) signed
    - 13th   Note agreeing (hugely busy week)
    - 13th   Signed consent (Brun)
    - 15th   Signed consent (Quat)

- o 23rd   Indication of involvement (Yun – 2 weeks holiday)

- <mark>REFLECT. Are those that are not responding exactly the type of people that I need to get a hold of? Too busy? Too engrossed? How might I get to these?</mark>
  - o Opt out?
  - o How might I test this this time around? Do I want to make a second attempt with a subsection of them? (e.g. 3)

- **NBNB** What is my **ASSUMPTION.** Is this a question? Despite their initial enthusiasm people are too busy to engage once they are out of the bubble. This was born out. I am looking to compile a temporal picture of how things have been over this period WITHOUT drawing peoples attention to this (Catch them being themselves).

- **SECOND ATTEMPT (two week *golden* period)** Sent a second note to all the remaining participants – these are the people I am ***most interested*** in talking to. This was sent on the Saturday morning UK time 2 weeks after the program to 15 participants. The note was deliberately short and accommodating in tone. It was titled '10 minute chat?' (text below). I was aimed to have impact and attract attention (highlighted time commitment, underlining and my flexibility). I included the original e-mail as part of this e-mail for an additional element of moral blackmail (e.g. people could seen the original note).

I do NOT have signed consent so need reterospective consent. This would have been too much to look for (a disincentive)

Dear X,

I hope all is well with you?

I was wondering if it might be possible to have a catch-up for **10 minutes** (…absolute maximum!) sometime this week? I <u>promise</u> it would be no longer than that.

Happy to flex to a time that works best for you.

Kind regards,

Barry

The response pattern was as followed

      ▮One out of office response ▮▮▮

- Sing (▮▮ traveling

217

- Sing (████)
- ████ (on holiday)
- ████████ (speak now or Mon then traveling)
- ██████ (Sunday) (busy and traveling)
- ████ (Sunday)

09:31 Sunday. I wondered if there would be any addition end of Sunday checking?

What was interesting was the number of people who quoted holiday or travel as an important part of not being able to get back to me. Also those who said that they were willing to speak over the weekend (2)

NB – this is classic action research. Being flexible as I go in term of my needs and how I achieve them (the reflective and interative cycle)

Do I really want to change this way of connecting? ████████████████ ████████████████████████████████ In theory I do. This would seem to be the most sensible way of traditionally approaching but it does not catch people being themselves. **NB**

- **Presentation**: Opportunities for me as to how I present my results – tier 1, 2, 3 and no shows.

- REFLECT – **NB** how to do this better? I suspect that the response rate is a function of the phenomena that I seeking to investigate. As a form of the Zaigarnik effect particpants have drawn a line under this experience, have moved on and have now returned to 'normal' - this event-based learning is a thing of the past. Can the intensity of the experience be counter productive in some way?

- REFELCT – **NB** I never forget the look on XXX face at the end of APRIL LSD. It was a very good, intense week . I was walking with him as he headed off to his next meeting. BY implication this was no done. It had worked. It was a success. It did not need to be worried about any more and he was LITERALLY moving on to the next thing. His mind was now somewhere else. he had to be somewhere else. I was last hours concern. I found it hard to maintain his attention as he disappeared down the main stairs.

- REFLECT: how do I avoid impacting my results by a form of HAWTHORN effect. They know that they are getting a certain degree of attention and that impacts their performance – HOW DO I MINIMIZE THIS
  - o Do they want to keep me happy by giving me the 'right' answer – that the program was a good idea
  - o Case for asking indirect questions about related social practices – that gets me my answers

- PROGRAM: Can I use the data that I get from the program as an insight into the real-world of the participants e.g. the simulation as part of my data?
  - Is this ethical? Get them to sign a consent form upfront ███████ ██████████████████████████████████ so it gets 'forgotten'
  - I could record the debrief

Findings re pedagogy
- Changes the metaphor - frame as an interruption not an intervention
  - What I hear back from people about the immediate aftermath – description of their worlds
- The immediate golden hour matters (how do I evidence this?)
- Not a full stop (a comma)
- Create the on-going Zaigarnik effect
- DON'T be open-ended re practice – fixed term
- Position it like a specific task
- NB What does your travel schedule look like? Are you out a lot around the program or on another program? (Catch-up)

- **Second population**. The learning professional (███████████ How quick do they move on to other things?

  - Forced me to question what am I really looking to find out? What are my questions? Is there a second set of questions for ██████████
  - I have a **good story line.**
    - I am interested in what happens after
    - Doing (not learning)
    - Individual focus normally (context)
    - Context – space and time
    - Time – linear and non-linear
    - Delivery – literal or visual
    - What and How

  - What happened **AFTER** – not just **WHAT** we do with people to support but also HOW we reengage with them. This, as I mentioned above is intimately related to the nature of the experience after a 'successful' event.

  - Raw questions
    - TO what extent was this done when you walked out of the room?
    - How quick did you move on to other things?
    - What was it like on your return to work?
    - Did you have any sense of what was awaiting you?
    - What chances have you had to practise your development? Is this more or less than you would have liked?
    - Do you still see yourself as on the program?

- o How do you feel about the program now? How would you describe your time on the program? How do you feel about your commitment? [Ask that exact question again]
  - ON the basis of your experience (what you have done) over the last two weeks - how would you answer
- o Do you consider that you have unfinished business?
- o What are you focusing on? (Can they remember? Can they be specific?)

Monday (16th)

I want to do two things this week
- Keep my (this) note updated
- Touch base with the group of 8 by the end of the week.
  - o What do I want to find out?
  - o How do I do this most efficiently? 5 online questions? What am I looking to find out?
- Attempt to get a hold of 3 that did not respond – and get from them.
- Send by Wednesday
- This is outside the scope of what I indicated

Appendix

Hi Barry, you can call me anytime incl this weekend & Monday. I will travel from Tue-Fri next week so that would be more busy.
Cheers

Hi Barry
Apologies for the late reply, the week after the course was a little hectic and last week i was on leave. This week I am travelling with a full program Monday- Wednesday. Thursday or Friday should be good. Ideally Friday your morning?
Thanks

Hi Barry,
All is well on this end and hope the same on yours.
I'm happy to have a call this week. I'm free on Tuesday other than between 10 and 12 UK time so let me know whatever works for you.

Dear Barry,

Apologies for not responding. I am on Holiday until October 29. Is it possible to talk then?

Thanks

Hi Barry, I'm actually still traveling since 2 weeks ago but a quick call next week should be fine.   Or are you able to talk now / during the weekend f you don't mind?

Appendix M: Excel sheet for semi-structured interviews (II)

> An example of basic Excel Model used to manage data. For PPP this model ran to 5 sheets.

Meeting	Distraction	Rec	Send	Pace		Orientation	Future	Present		Role	Focus	
		80	30	Fast (8)	1	8 Future	1					Temporal strats
70%	10,00	10	70	30 Fast (9)	1	9 Future (80/15/5)	1		Maintain focus			
50%	20,00	20	80	40 Fast (8)	1	8 Present (F)		1	Trying to carve out more time to refect			
70%	20,00 Constant(10)	40	20	6		6 Present (F)		1				25% Spinning plates
70%		50	30	7		7 Future, Presnet						Busy, Spinning plates. Temporal strats
50%		30	20	Fast (8)	1	8 Future	1				Fading	My computer pops and pings me
70%	15,00 15 Meetingsl	20	10	Medium		Future, Presnet				yes	Nice to have	
75%	Constant	60	30	Fast	1	Future	1			yes	no opport	Nature of distractions
75%	10,00 ? 10	110	110	Fast	1	Future	1					Revels in lifestyle - badge of honour
70%		20	10	Medium		Past				Yes	60%	
75%	10,00	15	40	20 Fast (8)	1	8 Future	1			Yes	Fading	"trying to buy free speace for a future t
60%	12,00	12	50	50 Fast (10)	1	10 Present		1				Good focus
50%	Too many	60	35	Fast (8)	1	8 Future	1			Yes	Not	
80%	10,00	50	20	Fast (7)	1	7 Presnt		1				
865%	107,00	760	455		79						0,43%	
67%	13,38	54,2857143	32,5	10	7,9		7	4				

											PINGING	Games they play
1												
2												
3	95	100 Missed	Missed	Fast		Present	70/30	never enough		PINGING	Games they play	
4	90	50	30	Fast - 9		9 Future		Fitbit		Games they play		
5	WastedVuca	25	65	Medium -6		6			Change of role	PINGING		
6	70	50	30	Fast - 8-9		9 Future/present - don't llok back		Pinging	BLOCKS of time	PINGING - I get some few phone calls		
7	80	20	40	30 Fast-medium 8		8 Future/present - don't llok back						
8												
	335	145	205	90 Fast		32						
	83,75	48,3333333	51,25	30		8						
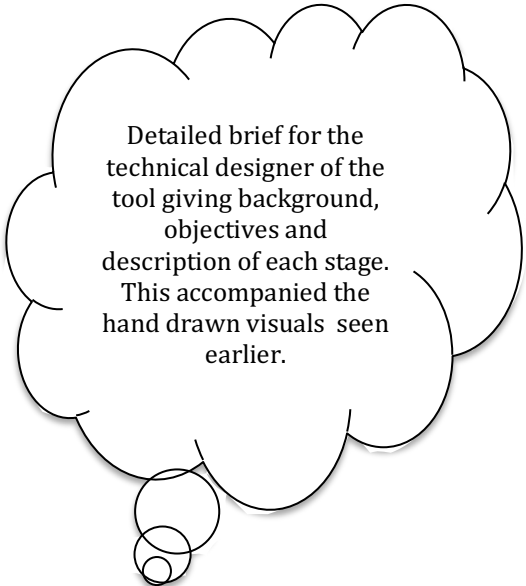
Appendix N : Technical design brief for tool coder

Design Guidelines

The following document represents an abridged merging (including mark-ups) of three documents produced by Barry Rogers for ████████████ (dated 8/8/2017, 21/8/17 and 29/9/17). The purpose of the document is to provide a clear and comprehensive set of design guidelines to assist Alexander in developing a working prototype of a visualization tool.

The document is broken into four parts
1   Background
2   Description of the model
3   Technical document
4   Diagrams (provided separately)

Detailed brief for the technical designer of the tool giving background, objectives and description of each stage. This accompanied the hand drawn visuals seen earlier.

1   Background

I, Barry Rogers, am an EdD candidate in the Faculty of Education at the University of Cambridge (4th Year, part-time).

I teach social psychology at the London School of Economics and Political Science. Alongside my teaching I design and deliver customized learning programs inside organizations. I typically work with experienced adult professionals transitioning from specialist to enterprise leadership roles. ██ ██ ██ ██████████████████████████████

There is a big issue for learners in my field. Despite the well-meaning intentions to practise new learning after a formal intervention, most of these intentions do not stand the test of time – they seem to get lost in the action, traction and distraction of everyday working life.

For my doctoral thesis I am exploring the role of non-linear time in practising learning commitments after a customized executive education program. The study is structured as a sequential Quan-Qual Mixed Methods Action Research project focusing on members of a deal-making community at a European multinational organization.

As part of my research I am developing a visual coaching tool. The tool, based around the interface of the electronic calendar, acts as an elicitation and enabling vehicle (a *conversation* tool) to support the practising of post-program learning intentions. It seeks to make visible the non-linear dimensions of time

within the working day/week of the interviewee, to highlight the contextual 'stuff' that often gets in the way of the best intentions to practice.

To illustrate the visual nature of time I submitted a selection of story-boards as part of my Registration Viva. Each of these boards represents a non-linear dimension of time that is relevant to an individual's life at work. ████████

What is the process of data gathering and visualization?

There are two phases to my study. In the first phase the data for each of the temporal dimensions will be captured via a 30-minute interview questionnaire. I will ask the interviewee a series of (mostly) closed questions - circa 40 in total - related to each of these dimensions. The dimensions are defined as follows:

- Temporal *density* – The perceived volume of meetings and commitments in the working life of the interviewee.
- Temporal *interruption* – The perceived level of interruption (and/or connectedness) in the working life of the interviewee.
- Temporal *direction* – The orientation associated with the interviewee's preferred drive and thinking style.
- Temporal *velocity* – The perceived pace of the interviewees working environment.
- Temporal *visibility* – The perceived clarity of the interviewees external environment (e.g. to what extent does it support decision-making and planning?)

Data from the questionnaire will then act as the input to produce the visualization of the temporal dimension. These visualizations will be used as a conversation tool in the qualitative phase (II) of the study. Practically I want to be able to sit with an interviewee, either face-to-face or virtually, and show them 5 different dimensions represented on a screen.

This intention therefore is to create a prototype that is

- Stable (e.g. is robust from a technical perspective)
- Usable (e.g. can be employed face-to-face and remotely, via sharing a screen)
- Places a premium on plausibility over accuracy (e.g. allows me to connect quickly with my interviewees)
- Requires limited design work (e.g. is based around my existing story-boards/visualization designs)

2   Description of the model

Backdrop

The first thing that the interviewee sees when looking at the prototype is the blank 'calendar' backdrop. This backdrop is a simple, white representation of a recognisable online calendar (e.g. Outlook or ICal). It remains consistent throughout the journey of the interviewee. This image fit exactly onto a laptop screen – there are no plans at this stage to make this viewable on smaller devices e.g. phone.

This calendar is in weekly view (seven-day) mode – this starts on a Monday and goes through to the following Sunday. The time is broken down by hour, each divided by a feint grey line. Saturday and Sunday appear on the calendar with a light grey filling. On the screen there is space at the top and the bottom of the calendar – this is to allow for elements of visualisation to appear *outside* the specified calendar time range. This range is specified by the start/end times of the interviewees meetings. The space above and below the formal calendar is not proportional to the length of time within this space (e.g. it is *compressed* space). The days on the calendar image are labelled at the top of the screen (for each column), while this (labelling) row also represents midnight (00:00) from a time perspective.

The input categories for each screen appear on the side of the page (e.g. sidebar on the left). This is visible to both the interviewer and interviewee.

Each screen will appear and develop independently. As an example Screen I, *Temporal density,* will initially appear as a blank calendar screen and build up on the basis of the differing components of that screen (e.g. 'start time', 'end time'…). However there will also be the capacity to combine the output of different screens (e.g. Screen I and Screen II being the combination of *Temporal density* and *Temporal Interruption*).

Screen I: *Temporal density*

The first visualised screen is called 'Temporal density'. This represents the perceived volume of meetings and commitments in the working life of the interviewee.

Input for screen 1

There are five input categories in the sidebar for this screen. The 'label' refers to how each input category is described in the sidebar.

Label: 'Start time' (of meetings)

[1] Input: This appears as half-hourly options throughout the day

Label: 'End time' (of meetings)

[2] Input: This appears as half-hourly options from throughout the day

Screen output: Against the blank calendar backdrop meetings now start and finish at the time specified from the inputs in the above two categories. These start and finish limits occurs across the week from Monday to Friday (e.g. 8am and 7 pm). Saturday and Sunday have no start and finish times for meetings.

[3] Label: '% of meetings'

Input: This appears as a slider from 0% to 100%

Screen output: Inside the area bounded by the start and finish times the specified percentage of meetings (e.g. 60%) appear as 'blocks' of meetings on the screen – similar to a standard online diary. These blocks are coloured (e.g. blue) in order to represent the volume and density of commitment (again similar to a standard diary). The percentage of total meetings is spread across the week however some of the meetings will obviously be in back-to-back form (e.g. there will be more back-to-back meetings as the percentage of overall meetings rises). The 'standard' meeting time in one hour but there is the capacity to have shorter (e.g. 30min). There is also the capacity to change the colour of meeting blocks from the standard blue background.

As we discussed I would like to have control over the profile of the meeting density throughout the day. On reflection I think that this can be achieved quite easily using the above approach.

Example of 'morning only' meetings: This would be achieved by the following only inputs

Start time   : 06:00 AM
End time   : 11:00 AM
% of meetings : 70% (meaning that 70% of the hourly blocks over the period Monday to Friday would be blocked out in blue)

[4] Label: 'back-to-back meetings'

Input: This appears as the option 'yes' or 'no' (in response to the original questionnaire question 'do you recognise the term back-to-back meeting?)

Screen output: Once 'yes' is chosen the % of back-to-back meetings is highlighted on the output screen (e.g. 'temporal bubbles'). These appear as red outline 'rounded' rectangles drawn around the series of back-to-back meetings. A back-to-back meeting is anything that has two or more meetings in a row.

[5] Label: 'temporal control'

Input: This appears as the option 'yes' or 'no'. When 'yes' is chosen there are now two other options 'request' or 'place'

Screen output: Once ('Yes'/ 'request' or 'place') is chosen the remaining free hours (e.g. those not covered by blocked out meeting time) start to flash/pulsate. These represents the lack of control associated with others being able to see *into* the interviewees diary and either request or place a meeting. I am open to your suggestion but would think that there is a different shade of colouring associated with either 'request' or 'place' (e.g. 'request' is lighter and 'place' darker).

Screen II: *Temporal interruption*

The second screen to appear relates to *temporal connection*. This represents the perceived level interruption (and/or connectedness) in the working life of the interviewee.

Note: Each screen (representing a different temporal dimension) can operate on a stand-alone basis (e.g. just 'temporal connection') or can be combined with the output from other screens (e.g. 'temporal connection' and 'temporal flow' output together on one screen).

Input for screen 2

There are seven input categories in the sidebar for this screen. I have presented them in the appendix in individual form as

[1] Label: 'Check device (first')

Input: This appears as hourly intervals from 4am to 10am

Screen output: This appears as the upper limit (in red) for
- o   Sent e-mails
- o   Numbers of 'connections' in an hour

[2] Label: 'Check device (last)'

Input: This appears as hourly intervals from 4pm to 12 midnight

Screen output: This appears as the lower limit (in red) for
- o   Sent emails
- o   Number of 'connections' in an hour

[3] Label   Number of email (sent) per day

Input: There is one input field for this category
- •   Numerical range (being the number of e-mails sent by the interviewee in a day)

Screen output: This appears as green dots and are distributed throughout the day – inside the red 'checking' lines.

[4] Label   Number of 'connections' per hour

Input: There is one input field for this category
- Numerical range (being the number of 'connections' per hour)

Screen output: These appear as black dots. My current thinking is to use this category as a catch-all for the different types of interruptions during the 'working day'. This is a function of the number of times a person checks their phone in an hour and the number of audible notifications (e.g. pings these receive).

These appear per hour (e.g. 20 black dots in an hour) with 90% of these located 2 hours inside the first and last checking time. [This measure is used as a proxy for the core of business day – I am assuming that 2 hours after the first check is when people are coming to work and 2 hours before the last check is dinner, relaxation etc. So the majority of the dots (90%) would be during business hours]

[5] Label   Number of emails (received) per day

Input: There are three input fields for this category
- Numerical range (being the number of e-mails received in a day)
- % outside first/last check
- % inside first/last check

Screen output: This appears as red dots that are spread throughout the day (including during meetings). To reflect the 24-hour pattern of e-mail arrival (x) % will appear outside the first-last check and % appear within these limits (Alexander- please disregard the GREEN dots in example 5 in the appendix – these have been added in error)

[6] Label: Check device (night)

Input: There are two input fields for this category
- 'Yes' or 'no' (if 'Yes' is chosen this makes the 'number' category live) [agree]
- Numerical range - being the number of times that the interviewee checked their phone during the 'night' in the last week (e.g. the 'night' being between the last time that they routinely check their phone in the evening and first time they routinely check it in the morning e.g. [1] and [2} above]

Screen output: these appears as (bigger, filled) red circles during the night (e.g. outside the checking times range) across the week from Sunday to Friday night e.g. please see three small red circles in the example.

[7] Label: Check device (weekend)

Input: There are three input fields for this category
- 'Yes' or 'no' (if 'Yes' is chosen this makes the 'number' category live)
- Numerical range for Saturday 0-100 (being the number of times devices are checked on Saturday)
- Numerical range for Sunday (being the number of times devices are checked on Sunday)

Screen output: These appear as black dots with (x) % appearing evenly spread on Saturday (e.g. 20%) and (x) % appear on evenly spread Sunday (e.g. 80%)

Screen III: *Temporal direction*

The third screen relates to *temporal direction*. This represents the orientation of the interviewee's preferred drive and thinking style.

Input for screen III

There is one input categories in the sidebar for this screen.

Label: '[past] [present] [future]'

[1] Input: The three dimensions '[past] [present] [future]' appear in the side-bar of this page. The interviewer has the ability to highlight any of these on the basis of the interviewee's questionnaire response.

Screen output: On highlighting any of the above dimensions a large arrow will appear over the face of the calendar. This arrow represents the temporal orientation of the interviewee. These arrows only appear in one form (e.g. no refinement for any form of weighting).

There are three possible directions for the arrow.
- A future orientation is represented by an arrow that is facing to the right of the screen.
- A past orientation is represented by an arrow that is facing to the left of the screen.
- A present orientation is facing downwards on the screen.

All arrows are positioned in the centre of the screen and are stocky in character (e.g. thick, not line arrows). The arrows are shaded in a dark colour (e.g. red as per the visualisation) that partially obscured the underlying calendar details.

On the basis of the piloting to date it has been relatively straightforward to get interviewees to ranks their preference between past, present and future. In instances where an interviewee ranks two dimensions equally two arrows will appear on the screen (e.g. one facing left and one facing downwards in the middle to represent an orientation to the past and present).

Screen IV: *Temporal velocity*

The fourth screen relates to *temporal velocity*. This represents the perceived pace of the interviewees working environment.

Input for screen IV

There is one input categories in the sidebar for this screen.

Label: '1 - 10'

[1] Input: This appears as a slider. The number '1' is at one end of the slider and '10' is at the other. '1' represents a perceived static/sedentary pace, while '10' represents a (perceived) 'non-stop' pace. The interviewer has the ability to indicate the specific 'pace' (as answered by the interviewee) on the slider.

Screen output: The driver for the page is the input category (e.g. '1-10'). Once this has been activated (e.g. 'run') the contents of the screen (e.g. the calendar) will move from left to right at a pace determined by the number highlighted on the slider (e.g. '1' no movement, while '10' goes at the fastest pace). As the calendar moves off the page on the right hand side it will simultaneously reappear on the left of the screen and the 'loop' will continue. The choice of any number on the slider less than 10 will have the page moving at an increasingly slower pace.

Screen V: *Temporal visibility*

The fifth screen is called 'Temporal visibility'. This represents the perceived clarity of the external environment (e.g. to what extent does it supports decision-making and planning?)

Input for screen V

There are three input categories in the sidebar for this screen.

NB as per the previous document the 'label' referred indicates how each input category is described in the sidebar. Also I have used the same screen visualization templates as before so when you see that I have overwritten an input box with a slider, this has no design significance.

Label: 'Continuity – Change'

[1] Input: This appears as a slider. 'Continuity' is at one end and 'Change' at the other. The input is the % split between these two categories (e.g. interviewee has stated that they see their environment as being 70% change and 30% continuity)

Label: 'Stability – Volatility'

[2] Input: This appears as a second slider. 'Stability' is at one end and 'Volatility' at the other. The input is the % split between these two categories (e.g. interviewee has stated that they see their environment as being 60% volatility and 40% stability)

Label: 'Certainty – Uncertainty'

[3] Input: This appears as a third slider. 'Certainty' is at one end and 'Uncertainty' at the other. The input is the % split between these two categories (e.g. interviewee has stated that they see their environment as being 40 % uncertainty and 60 % certainty)

Screen output: The assumption underpinning this screen is the change, volatility and uncertainty provide a challenging environment for decision-making and planning (e.g. choices about the future). Alternatively an external environment defined by continuity, stability and certainty makes it easier for planning and decision-making.

Given the above assumptions I propose to play on the use of 'fog' to diminish the clarity of the screen based on the average score of the (change, volatility, uncertainty) categories (e.g. (70 + 60 + 40)/3 = 57%). The 'fog' covers the whole week on the calendar (Mon-Sun inclusive). In terms of representation I have opted for an approach where 57% of the screen is covered by a dark 'fog'. In the appendix this appears as one complete/uninterrupted cloud of fog taking up 57% of the screen (with the remaining 33% of the screen clear). I would prefer if this complete cloud of fog could be broken into a number of separate clouds (e.g. 3), spread over different parts of the calendar, but obviously still totalling space equivalent to 57%.

3   Technical document

Alongside the above development Alexander will provide a short summary document (e.g. 1 A4 page) that outlines the key technical specifications and characteristics of the prototype model. This would allow an independent third party, if necessary, to further develop/refine the model at some future date.

Section 4 – Diagrams (provided separately)

Barry Rogers
22/10/2017

Appendix O : Mapping dimensions to the interview schedule

Mapping Literature to Quantitative (Semi-structured interview) and Qualitative (Visual Tool) Data Collection

Literature Review	Quantitative Data Collection (Semi-structured Interview)	Qualitative Data Collection ("Visual Tool")

'CLOCK TIME'

'Density '
Time commitments

→ **Semi-structured**
Time commitments
- Organization of commitments
- Scope of commitments
- Pattern of commitments
(Triangulate: e-diary)

→ **'Use'** (Board 1)

→ **'Flow'** (Board 2)

Transparency → **Semi-structured**
(Triangulate: e-diary)

→ **'Control'** (Board 5)

'SOCIAL TIME'

'Visibility'
VUCA Framework

→ **Semi-structured**
- VUCA Scaling
(Triangulate: company data, articles)

→ **'Visibility'** (Board 6)

'Orientation'
Past, present or future

→ **Semi-structured**
- Past, present or future ('Pull')
- Deadlines ('Momentum')
- Opportunities for reflection ('Pause')
- Ever ending? ('Closure')
(Triangulate: diary, e-mail data)

→ **'Orientation'** (Board 7a)

'Velocity'
Speed
Acceleration

→ **Semi-structured**
- Perceived speed
- Rate of acceleration
(Triangulate: diary)

→ **'Pace'** (Board 8)

'Interruptions'
Ubiquity of devices
Volume and frequency
Responsiveness
Physical and virtual workspace

→ **Semi-structured**
- Number of devices & media
- Volume and frequency
- Expectation of responsiveness
- Boundaries
(Triangulate: diary, e-mail data)

→ **'Connection'** (Board 3)

→ **'Blurring'** (Board 4)

Making Time Visible ⇢

Theoretical Approach [SI] that combines *Clock* & *Social* time

Appendix P : *Pattern language* codes

Interpretation activities: reading Information structures [**IA**]
This group of patterns describes the activities of diagram readers

IA1	Search
IA2	Comparison
IA3	Sense-Making

Construction activities: building information structure [**CA**]
This group of patterns describes the different ways of manipulating diagrams

CA1	Incrementation
CA2	Transcription
CA3	Modification
CA4	Exploratory design

Social activities: sharing information structure [**SA**]
This group of patterns describes the activities of people who use diagrams in collaborative contexts

SA1	Illustrate a story
SA2	Organize a discussion
SA3	Persuade an audience

Patterns of experience in use (that make up the preceding 3 profiles)

Experiences of visibility [VE]

VE1	The information you need if visible
VE2	The overall story is clear
VE3	Important parts draw your attention
VE4	The visual layout is concise
VE5	You can see detail in context

Experiences of structure [SE]

SE1	You can see relationships between parts
SE2	You can change your mind easily
SE3	There are routes from a think you know to something you don't
SE4	You can compare and contract different parts

Experiences of meaning [ME]

ME1	It looks like it describes
ME2	The purpose of each part is clear
ME3	Similar things look similar
ME4	You can tell the difference between things
ME5	You can add comments
ME6	The visual connotations are appropriate

Experiences of interaction [IE]

IE1	Interaction opportunities are evident
IE2	Actions are fluid, not awkward
IE3	Things stay where you put them
IE4	Accidental mistakes are unlikely
IE5	Easier actions steer what you do
IE6	It is easy to refer to specific parts

Experiences of thinking [TE]

TE1	You don't need to think too hard
TE2	You can read-off new information
TE3	It makes you stop and think
TE4	Elements mean only one thing
TE5	You are drawn in to play around

Experiences of process [PE]

PE1	The order of tasks is natural
PE2	The steps you take match your goals
PE3	You can try out a partial product
PE4	You can be non-committal
PE5	Repetition can be automated
PE6	The content can be preserved

Experience of creativity [CE]

CE1	You van extend the language
CE2	You can redefine how it is interpreted
CE3	You can see different things when you look back
CE4	Anything not forbidden is allowed

Paper III

Interaction of understanding and use

Paper III of III

Barry M. Rogers

The mountaintop and the swamp; the role of time in the practising of change commitments after a customised executive education programme

Paper III Interaction of understanding and use

Overview of Paper III

The focus of the study changes in Paper III. By August 2018 the working tool had been developed and was due to be employed (and evaluated) after an *Impact* programme - the 'Post Programme Process' (PPP). Throughout the PPP, the primary emphasis of data capture and analysis now shifted to achieving greater understanding of four temporal themes: 'Stages in a Time-scape', 'Temporal Contradictions', 'Temporal Practices as (deep) vessels of Identity' and 'The Temporal shadow of others'. The period also raised challenges surrounding the ultimate use of the knowledge produced by the PPP and how academic knowledge might be recontextualised to be fit-for-use at Forum. This contributed to a process of translating knowledge in order to seek wider industry validation.

Paper Three brings the key strands of the study together in two chapters. Incorporating the learning from the prior interviews, Chapter Seven details the use and evaluation of the tool and explores the four temporal themes. These themes set up a discussion of the PPP's implications, with particular reference to the dual considerations of understanding and use. Chapter Eight considers the wider impact of the study as well as its limitations. Finally, looking at the findings of the study as a whole, I revisit the research questions and reflect on the extent to which these questions have been addressed. In doing so, I pay particular attention to the growth of understanding over the course of the study and how this challenged some of the headline results and findings. I finish by seeking to place this study within the wider context of EdD research.

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7. The Post-Programme Process

7.1. Purpose and structure of the chapter

The final phase of the study employed the working tool over a two-month period after the September 2018 *Impact* programme (Figure 7.1). The aim was to evaluate the effectiveness of the working tool as well as to gain greater understanding of four temporal themes that emerged over the course of the interviews. This final phase incorporated the learning from the previous interview phases and became known at Forum as the Post Programme Process ('PPP').
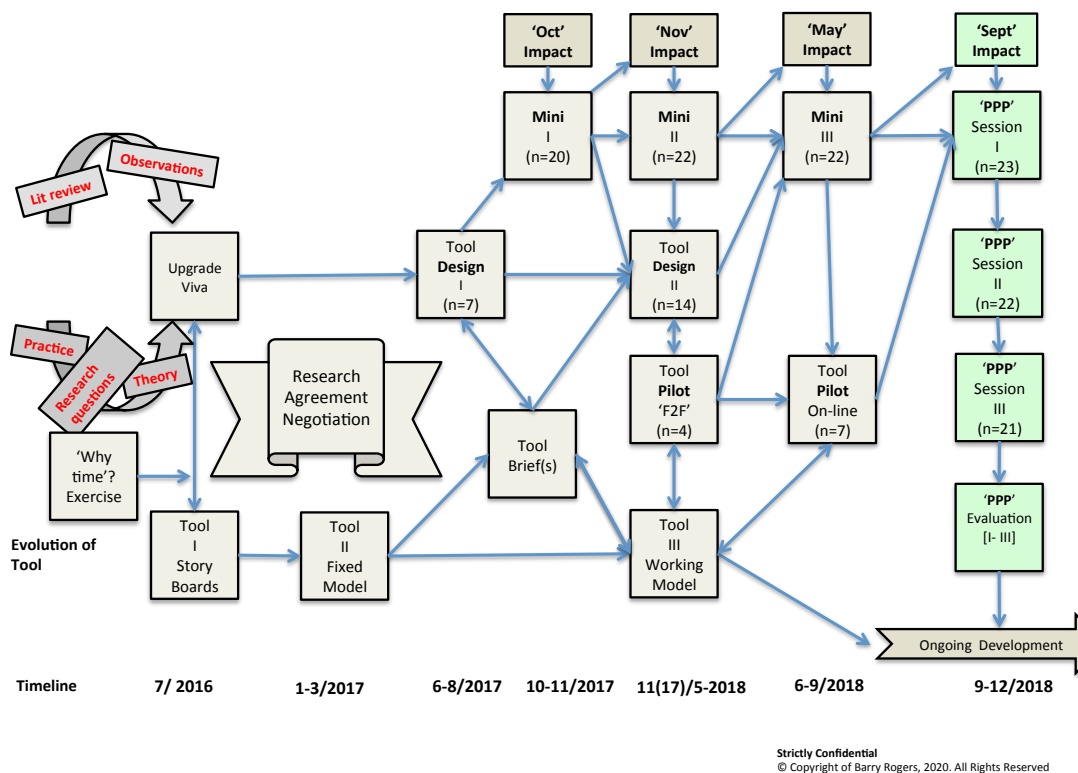
Figure 7-1 The Post Program-Process (PPP)

The chapter is divided into three sections. Section I provides background on the set-up to the September *Impact* programme. This includes a detailed description of the pre-engagement and engagement stages of the PPP, e.g. how learning from the previous interviews informed what happened before and during the use of the tool.

Following an overview of the analytical approach employed for the interviews, Section II outlines the findings from the four emergent themes – "Stages in a Timescape', 'Temporal Contradictions', 'Temporal Practices as (deep) vessels of Identity' and 'The Temporal Shadow of Others'. Each of these themes is followed by a brief discussion of the findings. Finally, Section III outlines the process of evaluation for the PPP as well as the results.

7.2. Background

The PPP involved three individual sessions with each participant after the programme. The programme had 24 participants nominated by Forum in line with the normal selection process (outlined in Chapter Two). I had no bearing on the composition of the group, and Forum had no knowledge during nomination that this specific cohort would be selected to evaluate the PPP. The programme was materially the same as the *Impact* learning experience employed in Tool Design, Tool Pilot and mini-interviews (referred to as the 'Prior Phases').

In total 23 out of the 24 participants on the September programme chose to take part in the PPP. The group was split 78% male/ 22% female. 22% of respondents were located in Europe, 22% in Asia, 39% in North America, 9% in South America and 8% in the rest of the world. On the basis of Forum job descriptions all respondents could be categorized as 'mid-career' professional knowledge workers working in a mix of front-line business and functional support roles. The estimated age range was 35 - 45 years with 10+ years of service at the company.

All programme participants were invited to participate in the PPP on a voluntary basis. To support this decision, participants received an initial overview of the research on the final afternoon of the programme (21st September). To underscore the voluntary nature of the exercise, no representatives from Forum made any contribution or comment relating to the study at this, or any stage during the PPP.

Participants completed an online evaluation form at the end of the face-to-face programme. The mean average score for *Overall Programme Satisfaction* was 4.8/5.0 and for *Individual Commitment to Apply Learning* was 4.8/5. This was in line with the levels achieved in the Prior Phases. As described in Chapter Two, the logic of establishing these measures was to ensure that the programme had 'delivered' on participants' expectations and that these participants had indicated a state of readiness for post-programme application (e.g. they could not say they did not apply their commitment because the programme had not been successful or they were not intending to apply their learning).

Similar to the Previous Phases each of the three interviews for the PPP (hereafter called 'sessions') took place via the 'SKYPE for Business' VOIP network – there were no face-to-face interviews. The sessions were recorded using an air-gapped digital recorder and transcribed following the previous method (excluding small talk and any sections relating to Forum's business). The length of the interviews ranged from 14 to 48 minutes with the (mean) average 26 minutes. As per the Research Agreement, copies of the final transcripts were maintained on a non-internet enabled ('air-gapped') computer. This computer was purchased specifically for this study (e.g. it contained no previous or subsequent file content).

7.2.1.   Evaluation Criteria

In September 2018 a meeting was held with the Senior Sponsor at Forum to determine criteria for evaluating the PPP. As noted in Chapter Two, measuring the effectiveness of formal learning is problematic. Evaluation tends to focus on initial reaction level with little emphasis on long-term change or results in the workplace (Saks & Burke-Smalley, 2012). Mirroring recent calls for a broadening of measurement criteria (Baldwin et al., 2017), Forum were eager to have a more realistic understanding of the impact of the PPP. This final evaluation design for the PPP was based around 5 criteria – satisfaction with the tool, engagement with the tool, change in behaviour, change stories and directly attributable revenue

contribution. Forum was also keen to pursue third party validation from peers within the learning industry for the PPP.

Evidence for the five criteria was gathered from a number of sources. Data on satisfaction and behaviour change was provided by means of a short questionnaire employed at the end of the PPP. Engagement data was calculated on the basis of voluntary attendance at each of the three PPP sessions. Change stories and revenue contribution were generated from the PPP interview data and triangulated by follow-up contact with the relevant manager and supervisors. Third party validation was sought through a peer-evaluated global industry award with transparent judging criteria. The final evaluation criteria were confirmed at a meeting with Forum management on 5th September 2018. Details of the criteria, along with the results are outlined later in this chapter.

7.3. Pre-engagement stages of the PPP

A key learning from the Prior Phases involved the ontological challenges of pre-tool engagement – an issue tied to the respondents' relationship with time as they returned to the workplace. To formally address this, the PPP process was divided between 'Session pre-engagement' (the period from the *Impact* programme to the start of the PPP) and "Session engagement' (the use of the PPP over the three sessions). When describing these, each stage of pre-engagement and engagement is labelled with a title and date outlining when it was initiated (e.g. 'Programme plus…' indicating the number of days before/after the end of the program).

7.3.1. **Pre-engament I** - *Constructing commitments* (*Impact* minus 3 to 0 days)

The first stage of pre-engagement occurred <u>on</u> the face-to-face programme. The Prior Phases had highlighted how it was often difficult for participants to engage with their commitments in the workplace because of the 'quality' of those commitments. In

many cases participants generated change commitments in a hasty fashion at the end of the programme and these could be abstract and hard to practise. This is not surprising. As highlighted in Chapter Two, commitment planning is usually squeezed into the final sessions of a programme. This would appear to be too limited a period, and too late a time slot for many participants to properly reflect on a meaningful commitment. In reality there is often a desire to get the process finished as quickly as possible – participants can be distracted and already have 'one foot out of the room'. To offset this, and connect more broadly with a process orientation, a *graduated* approach to commitment planning was developed for the September *Impact* programme. This process involved three steps.

First, instead of waiting until the final afternoon, participants now produced an initial draft of their commitment plan on the afternoon of Day 2 of *Impact*. This encouraged participants to reflect on post-programme application at an earlier stage in the programme. Second, participants displayed their draft commitments as posters in the plenary room. Fellow participants (as well as faculty) were encouraged to review the posters over the remaining two days of *Impact* and to give constructive feedback on the commitment. Colleagues provided feedback by placing a yellow 'sticky' with their feedback and name on the participant's poster. Finally, participants refined their individual commitment on the last afternoon of the programme. By this stage they had had different levels of feedback on their commitment e.g. on-going personal reflection, specific coaching/faculty feedback and suggestions from colleagues. In a dedicated session on the final afternoon each participant produced a revised commitment sheet and received suggestions from colleagues on the 'do-ability' of these in the workplace.

This exercise aimed to incorporate two key features of the study's research design into the construction of change commitments – the temporality of commitment setting and the iterative role of process. Where previously commitments had been a rushed, often abstract one-off event, they were now reframed as a more rigorous on-going and participative process.

7.3.2. **Pre-engagement II** - *Owning commitments* (*Impact* plus 0 to 4 days)

The Prior Phases highlighted how participants often start their transition back to the workplace from the moment they leave the plenary room. Ownership of commitments in these moments seemed to be important – treating the commitment as something that could be 'left behind' in the plenary room, as the participant strove off to their next challenge, appeared counterintuitive. This issue was addressed by asking participants to capture their final commitment in a compelling fashion <u>after</u> they had left the face-to-face segment of *Impact*. Specifically, participants were asked to send their commitment to me by the close of business on the following Tuesday – four days after the 'end' of the programme. The aim was to avoid participants 'checking-out' during the transition period back to the workplace. Finally, participants were encouraged to re-produce their commitment in a manner that would resonate personally when they were back in the office. In total 19 replies (80%) were received in a variety of formats before the Tuesday deadline with another 2 received before the first PPP session.

Ahead of this stage I sent a copy of the Participant Information Sheet and the Informed Consent Form for signing. This allowed for a 'cooling-off' period associated with the research. Signed consent forms were received from 19 research participants, and recorded verbal confirmations (by agreement) from the remaining 4.

7.3.3. **Pre-engagement III** - Session set-up (*Impact* plus 1 - 7 days)

Following receipt of a commitment plan, I replied to the respondents to set up the first PPP session. On confirmation of a specific date and time for the first session I then asked the respondent to send a meeting request for each of our diaries. I judged it important for the individual respondent to send this meeting request as it reinforced a sense of ownership in the session.

Each of the three individual sessions of the PPP was scheduled for 30 minutes (unless requested otherwise by the respondent). The date and time for a session was set at the end of the preceding session and the respondent, as per the first session, was asked to send an immediate diary hold for that session (e.g. time and date for Session II was agreed and confirmed with the respondent at the end of Session I). To ensure the validity of the underlying process there was <u>no</u> follow-up contact between the respondent and myself in the periods between sessions (e.g. no reconfirmation of attendance prior to the next session). The logic was to test whether respondents would remember to attend the next session, as well as to avoid last minute opportunities for cancellation.

7.4.   Engagement stages of the PPP

Three separate sessions made up the 'engagement' portion of the PPP. In total the engagement stage of the PPP involved 66 separate interviews with 23 initial (and 21 final) respondents.

7.4.1.   **Session I**   (*Impact* plus 6 - 49 days)

The first session for each respondent (n=23) took place between 6 and 49 days after the programme, a mean average of 15 days (median = 11).

The sessions incorporated learning from the Prior Phases. The opening of the session sought to reconnect in a casual and relaxed manner consistent with the experience of the *Impact* programme. Following the guidance of the *Pattern*s the intention was to achieve a degree of immediate connection with the visualization tool. I sought therefore to use the tool in a controlled and succinct manner in order to collect temporal data that would allow for a meaningful conversation during the call. A pared-down interview guide was prepared that allowed me to zone in on key themes and questions for the session (See Appendix A). This guide was updated and refined

over the course of the first sessions. The session was kept pacy and on time in order to signal to respondents that the allocated time slot would be respected.

For all sessions I 'arrived' at least 10 minutes ahead of the call in order to test the technology. The call was initiated from a MacBook Air computer located close to a server so as to maintain connection and bandwidth throughout. Interviews were conducted in audio (between myself and the respondent) and simultaneous video screen sharing was employed to display the visualisation model. I conducted the interview standing up with the computer screen at face level so as to enable my unrestricted hand movements and facilitate a naturalistic tone in my voice. I also placed my hand drawn diagram (of the mountaintop and swamp – see Figure 7-2) beside the computer to remind myself of the potentially different 'worlds' being experienced by either side in the interaction. There were internet connection issues with four respondents during the first call - three participants were unable to see the tool because they were on a different version of Forum's VOIP system and one was not able to able to connect to the system.
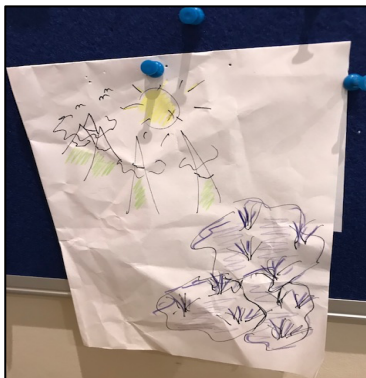
Figure 7-2 Hand-drawn 'mountain-top' and swamp.

7.4.1.1.   How was the tool used in Session I?

The tool was employed as the first activity during the first session. This activity occurred 3-5 minutes into the session, after initial connecting and housekeeping, and lasted for 4 minutes (maximum).

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To set up the use of the Tool, I would first ask respondents to enable me to share my screen (note: this involved a short set of instructions that had been established after the technical difficulties encountered during piloting). Once the screen was visible to both parties, I proceeded to ask (some variation on) 8 questions that allowed a temporal profile to emerge. These included:

- When does your working day start and end?

- What percentage of meetings do you have in a working day?

- Can other people at work put a meeting in your diary? (at what level)

- What is the first time (and last time) you check you check your mobile devices for work?

- How many emails do you receive in a working day?

- How many do you send?

- Excluding emails, how many times might you be interrupted, physically or virtually, in an hour of the working day? [Examples]
    - You are pinged
    - You check a device unsolicited
    - A tap on the shoulder
    - Someone pops by your desk

- Do you check emails/phones at night, over the weekend?

To help the reader gain an appreciation of this experience, the following is a link to a short video that closely follows the responses from the interview transcript in

Appendix B. For best use it is best to copy and paste the link into the browser and press play.

‌ ██████████████████████ [Redacted]

As the respondent answered each question, I input the data simultaneously into the sidebar on the screen which would immediately produce an output on the screen (e.g. 70% of a day in meetings would 'block-out' 70% of the diary with meetings). As each visual dimension appeared, the respondent could see their specific temporal profile build in front of their eyes. At the end I usually paused and asked respondents to look at the profile. After 10 seconds I then asked 3 questions

- So…what does that profile say to you, if anything?

- Where does your commitment to change fit into this type of temporal profile?

- What temporal strategies can you develop to create the conditions for disciplined practising? What might these look like?

The aim of the last question was to produce a tangible temporal practice that then became the basis for practising in the period between sessions I and II. This practice became the starting point for the conversation in Session II.
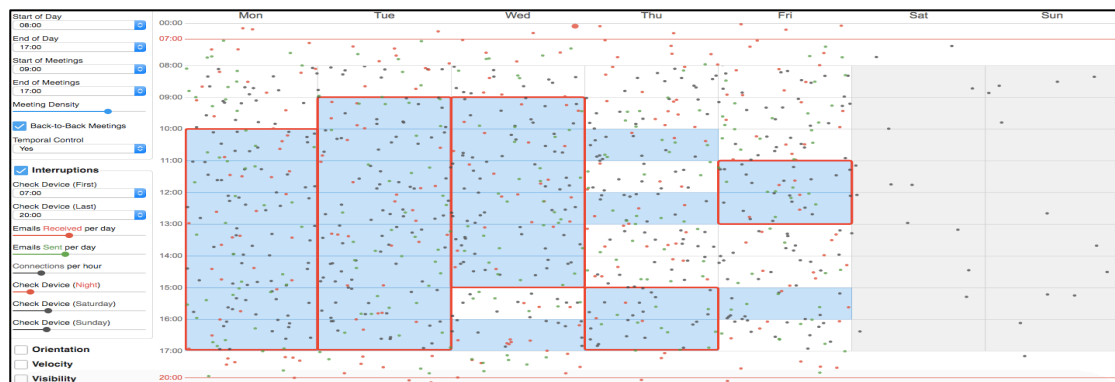
Figure 7-3 A screen shot of the cumulative temporal tool output

The tool was used only <u>once</u> over the three sessions (e.g. as the first activity during the first session). The logic was to establish the base case temporal profile for each respondent that could then be used as an elicitation reference over the course of the sessions (e.g. Do you remember what your profile looked like in Session I?). To keep the temporal profile 'alive' for each respondent, the profile was screen shot at the end of the first session and emailed to the respondent immediately after the call. It was also used as the backdrop for the start of sessions II and III (e.g. "Just to remind you of the profile we generated in our first session…how does this look now?'). A copy of a typical combined profile from Session I can be seen in Figure 7-3.

7.4.2.   **Session II**   (*Impact* plus 38 - 70 days)

The second session (n =22) took place 38 to 70 days after the programme, a mean average of 42 days (median = 45). This session was intentionally less structured than the first session. The rationale was to provide the respondent with the necessary time to discuss issues that may have arisen in trying to create the conditions for disciplined practising of their change commitment. 22 respondents took part in this session while one respondent (of the original 23) declined to participate due to work commitments.

There were three objectives for the second session. The first was to gauge progress, if any, in the respondents practising of their change commitment. Second, the session was an opportunity to refine the temporal strategies underpinning the respondent's commitment and introduce any additional elements of content that might support the strategy. Third, the hope was to maintain a vibrant connection with the respondent so as to ensure their continued involvement in the PPP.

The addition of supplementary content during the sessions became an important feature of Sessions II and III. This intention was to support temporal sense-making among the respondents. This content often included book and journal suggestions

and the use of Ebbinghaus's forgetting curve as a proxy for the potential fall-off in practising commitment. Examples of this additional content can be seen in the Period 6 of Paper II.

7.4.3.   **Session III**   (*Impact* plus 53 - 91 days)

The third and final session took place between 53 and 91 days after the programme, a mean (and median) of 73 days. Once again, the session was intentionally less structured than the first in order to discuss issues related to practising and refine temporal strategies. The aim of the session was also to gather any qualitative feedback on the PPP. As a final activity, respondents were asked to fill out a short evaluation survey which contained seven statements – five using a five-point scale and two allowing for open-ended responses. Conscious of time dynamics the survey was positioned as an activity that would take 'less than 4 minutes'. 19 (of the 21) participants returned the form – this occurred anonymously using a central e-portal. The results from the evaluation of the PPP are outlined later in this chapter and screenshots from the survey are included in Appendix D.

7.5. Data Analysis

The analysis during the PPP was primarily inductive and built around four emerging themes - these were initially informed by categories and themes that had appeared in the analysis during the Prior Phases (e.g. the repeated references to 'normal' time).

From an analytical perspective the balance between understanding and use changed during the PPP. Interview data (including notes) continued to be analysed in-the-flow in order to support generative conversations with respondents and to refine the on-going use of the tool and process. This data however was primarily analysed after-the-fact. The shift in emphasis related to the nature of the process methodology described in Chapter Five. While I was still interested in prehensive processes (in-the-flow, from the inside) the key driver for analysis was now a developmental approach

to process (after-the-fact, from the outside). In particular the process of analysis involved three stages.

[1] Hand written notes were made during, and in the immediate wake of every session (all 66 interviews). The aim was to capture top-of-the-mind themes and reflections surrounding content and tool use while still in-the-flow.

[2] All sessions were transcribed in Microsoft Word within 48 hours. In most cases transcription took place on the same day as the interviews while the session was still 'fresh' and in order to avoid any transcription backlog. Initial themes were highlighted and a summary of themes, including the hand-written notes, were added as bullet points to the top of the transcription page. To facilitate 'in-the-flow' analysis this transcription record became the basis for the next session with the respondent. In line with the Research Agreement, transcription did <u>not</u> include small talk or any references to Focus business activity. All 63 interviews were transcribed by 23/12/2018. A specimen copy of a redacted PPP transcript can be found in Appendix B.

[3] The initial themes from the 63 interviews (including notes) were combined into a single Microsoft word document in January 2019. Guided by the global themes of 'Time' and 'Tool' a process of iterative categorization was repeated six times through February/March 2019. For the global theme of 'Tool' a range of topics and sub-themes emerged concerning the use, development and refinement of the tool. This data was mostly tactical in nature and has been excluded from the analysis, and presentation of findings. For the global theme of 'Time', four broad sub-themes emerged that coalesced around stages, contradictions, temporal practices and the role of others. Through an on-going process of thematic refinement (Attride-Stirling, 2016; Castleberry & Nolen, 2018; Ding & Meng, 2014) these basic themes were developed further over 18 months (2019/20) to produce the specific themes explored in this chapter. These themes were also represented in a series of evolving thematic maps. Alongside this process I revisited my methodology and literature throughout

2019 and 2020 and undertook substantial revisions on the basis of the findings and analysis.

7.6. Findings

As highlighted in the section above, four themes emerged from the analysis of the PPP. Each of these themes is outlined separately below and is followed by a brief discussion of the key findings.

7.6.1.   **Theme 1** – 'Stages in a Timescape'

Over the course of the three sessions five temporal stages were identified in the post-programme period. These were labelled as 'The Glow', 'The After- Glow', 'Injection of Realism', 'Normality' and 'The Diminishing Glow'.

7.6.1.1.   'The Glow' [Final day of Impact]

Each participant filled out an anonymous on-line evaluation form at the end of the September *Impact* Programme. The results from the forms indicated a period when the 'glow' felt by participants was very much in evidence.

The key quantitative scores from the September *Impact* programme positioned it within the top 5% of all learning programs at Forum. This included measures related to overall satisfaction (4.8/5), personal commitment to apply learning (4.8/5), relevance of the learning to improving a respondent's performance (4.7/5), satisfaction with the delivery of the programme (4.9/5) and knowledge and expertise of the facilitator (Barry Rogers) (4.9/5). Participants were also asked whether they would recommend the programme to colleagues (the NPS, Net Promoter Score). This generated 83% promoters and 17% neutrals (there were no detractors). The qualitative comments on the evaluation forms were equally 'glowing'.

I will be able to apply all that I have worked on. All very relevant and applicable!

7.6.1.2.   'The After-Glow' [The first PPP session]

The programme clearly still resonated with respondents in the days immediately after *Impact* – there was a clear 'after-glow' evident in many of the comments made at the start of the first session or in the set-up emails. The emotions underpinning this after-glow were often powerfully expressed. Respondents cited how they felt more positive, empowered, refreshed, motivated, elated and (the word most frequently used) confident as they came back to the workplace. Many of these comments were offered on an unprompted basis at the start of the first session.

Before I went into this training I had NO motivation whatsoever. But that changed. I feel so much more confident in myself

A number of respondents said that the programme content and approach was 'truly transformative', something that set the programme apart from any other course they had attended at Forum. One respondent, who had attended another Forum course during the week following *Impact*, lamented the traditional format of that course and the extent to which it followed a formulaic approach to post-programme application and planning.

On Friday they said: 'write down what you want to do'…everyone was tuned out and it did not work. So I was actually laughing when those things were said

7.6.1.3.   'Injection of Realism' [The first week back in the office]

The post programme after-glow appeared to be short lived. A majority of the accounts in the first session were almost immediately tempered by a 'realistic' assessment of what it meant to be back at work. These accounts usually referred to

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the inevitable overhang of work (the 'catch-up') that had accumulated while the respondent was on the programme. The 'busy', 'crazy', 'hectic' and 'brutal' nature of the return peppered these descriptions while others talked about the 'tidal wave' or 'tsunami' of work that greeted them.

So often you come back from these things and you experience the tidal wave…it is brutal, and it has been so this week.

There appeared to be a process of transition and readjustment into work 'mode' for many respondents from the moment the programme ended. Three separate accounts gave an insight into how a sense of realism grew from the moment the respondent left the plenary room (Friday afternoon) to the Thursday of the following week.

The moment the course finishes you are looking at your watch and how you are going to get out of it then you get on the plane and you start to worry about what you have to do next week

Then all hell broke loose on Tuesday. Things went out of my mind on Tuesday.

Despite my best intentions I have not done anything yet in terms of specifics [Thursday]

For one participant the glow was extinguished almost as soon as he stepped into the office. The respondent's boss sent him an email that morning announcing that he would be out of the office and that he wanted the respondent to carry out all of his responsibilities. Reflecting on this episode during the second PPP session it was evident that the experience of having his expectations dashed, which he likened to a 'cold shower', was not uncommon.

Yes. The trite clichés.... This is going to be different this time. But the first thing I have is something in my inbox (from my boss) that says I am not going to be in today…[Expletive]…it was like a cold shower

One respondent encapsulated nicely the range of emotions at play in the immediate aftermath of the programme. She appeared to experience a crisis of confidence when she had time to consider the full implications of the change she had committed to – this forced her to postpone the first session while she tried to make sense of her situation. As she processed the implications of her commitment she could see that it had significant implications for how she spent her time (both at work and at home) and she was not sure whether she was ready for this.

I needed to take some time off. I needed to organise myself, well it is exactly what you said would happen. If I really want to make a change I will need to structure my day differently. It was mixed emotions last week. Excited yes, but also scary.

7.6.1.4. *'Normality' [Between the first and second PPP sessions]*

Many of the temporal dimensions highlighted in the Prior Phases (disruptions, distractions, meetings) were evident during the PPP. These appeared to 'kick in' for many respondents (as 'markers' of normality) during the first week.

[A]   Post-programme *Disruptions*

Similar to the Prior Phases, over 40% of respondents did not return directly to work on the Monday following the programme - a series of 'disruptions', planned and unplanned, extended the period before they returned to their 'normal' work. These disruptions included business trips, vacation, training courses, off-sites and illness. In some cases, respondents who returned to the office on Monday only did so for a couple of days before there was another reason for them to be away from that setting.

I was out for two days (Mon and Tues) immediately after the programme – then at an offsite (on Wednesday) so yesterday was the first day back in the office (Thursday)

These disruptions appeared to have an impact on how respondents framed this stage immediately after the programme. They usually suggested that these disruptions were not their 'normal' or 'real' mode of existence at work and therefore it seemed easy for them to postpone the process of practising – an activity that had to wait until they were back in what they considered to be their 'real' work mode.

My business unit gathered in Boston last week. So I really did not have an opportunity to come back to reality. I am in reality mode now.

[B]   Post-programme *distractions*

Given the evidence from Prior Phases, there were few surprises in how respondents described the distractions and interruptions in their working lives. The PPP benefited from the use of the tool to elicit some lively conversations on these dimensions. Similar to the feedback during the Tool Pilot interviews, the visualisation of distractions as 'dots' provoked an immediate response. Once again the tool helped in highlighting the multiple nature of interruptions - technological interruptions were combined with the physical 'tap on the shoulder', eating into the time of the respondents. It appeared too simplistic however to portray these distractions (in whatever form) as solely negative phenomena – they seemed to be important and functional in some way to a number of respondents.

Wow! There really are a lot of distractions during the day. But then I allow myself to be distracted quite bit. The distractions are somewhat addictive, a way of working that I have become so used to. They are kind a part of me, if that makes sense.

[C]   Role of meetings

Alongside the multiplicity of interruptions, meetings (face-to-face or virtual) once again took up a significant part of this return to 'normality'. One participant spoke passionately (and with some degree of emotion) about the impact that the volume of meetings had on her awareness of where she was at any point in time during the working day.

Sometimes, I have to be honest Barry I don't even know what meeting I am in...I need to look around the room for a clue!

The tool highlighted the role of both scheduled <u>and</u> unscheduled meetings. Unscheduled meetings in particular appeared to 'eat up' much of the space that appeared as 'free' (non-meeting) in a respondent's diary. One respondent spoke movingly about how he felt when he woke in the morning and checked his availability for the day.

I wake up some days and I almost find myself resentful, that if I have a 30-minute slot open in the day...that someone is going to fill it, jump into it.

Given the nature of their emerging leadership roles, respondents often related how they felt they were caught in the middle of the organisation, a place where those above, below and around them had a call on their time. Many of the respondents were managers and leaders of their own teams. This inevitably meant that meetings (as a mechanism of coordinating activity) were a necessary part in their role. As in Prior Phases there were indications from many that these meetings were not considered 'real-work' and that time had to be found elsewhere in their schedule (and outside it) to get 'work' done.

I consciously fret about being 'over-meetinged'. I need time to DO work!

The sheer volume of meetings during the day meant that many meetings were back-to-back without a break throughout the day. This not only used up large periods of time but also seemed to have an impact on how that time was experienced.

Respondents talked about being 'pulled along' by their meetings, that they felt they were living in a 'bubble' with the working week 'flying by'.

That (the tool) was a big 'a ha' moment for me. All these blue spaces in my day (meetings), it is real easy to cruise through all those appointments and it's Friday again.

7.6.1.5. 'The Diminishing Glow' [Between the second and third PPP sessions]

By the time of the second and third session <u>all</u> respondents referenced increased struggles with practising – the initial 'glow' appeared much diminishing. A number of respondents cited the increasing fragility of their change commitment and how easy it was for them to revert to old practices. The change in sentiment towards practising was clear from the tone and content of one respondent's account over the course of the three sessions.

(Session 1) It is just a week and things are still fresh to me. And my conviction is pretty high

(Session 2). This has been tough, I will not lie, at least it is (still) there

(Session 3) It has been…NOT bad (laughter). Not that I have forgotten everything and not doing it but I would say 55%.

Even those most successful at maintaining focus on their commitment experienced challenges over the three sessions. That said, there appeared to be a subtle difference in the approach of those that were successful at practising – for these respondents the nature of their 'successful' commitment seemed to change compared to what they had agreed at the end of the programme. In some way the commitment had evolved and adapted to deal with the reality and circumstances of their context.

It is all very fragile but I have sat down with my manager and we have talked about this...and frankly we have changed what I have looked at

For others, the time since the programme had made them realise that they were content with their current style of activity and that there was no need for fundamental change. Two respondents fitted into this category.

Over the last 25 years I have developed my style. Now it is a question of refining that style and optimizing it and it is different to when you were 25.

7.6.1.6. Theme I **-** *Discussion*

The passage of time after the Impact programme appeared to be distinguished by distinct temporal stages. For many of the respondents these stages started the moment they left the plenary room at the end of *Impact* - the process of leaving, and reengaging with 'real life', became intermingled with the visceral, felt experience of a range of temporal dimensions (e.g. emails, IMs etc). These experiences would appear to challenge the portrayal of the post-programme context as an undifferentiated, linear timeline.

As highlighted in Chapter Four, Adam's work on temporality is helpful in conceptualising a more complex post-programme period (Adam, 1994, 2004). In particular she suggests that it is often more productive to see time not as a timeline but as a timescape (Adam, 2008), a period with multiple dimensions of both linear and non-linear time. This would seem to be a more realistic descriptor of the post-programme experience on the PPP. Furthermore, recognition of the potential multiplicity of timescapes (e.g. incorporating different dimensions of time depending on the circumstances) allows the concept to be customised to fit different contexts. For the community at Forum we have seen how meetings and (multiple) forms of interruptions constituted key ingredients of their 'normality'. This may not be the

case for other communities. I will develop this point when considering the wider implications of the research in the final chapter.

Reframing a timeline as a timescape has implications for how we think about the experience of time – actors in this context are not just operating and existing <u>over</u> time but also simultaneously operating and existing '<u>in</u>' time. It is worth remembering the individual who returned to work all 'jazzed up' on the Monday following the programme only to receive a bland one-line e-mail from his boss. The respondent had a genuine and meaningful plan for his change commitment but opening that email 'in' that moment was like a 'cold shower'. Despite his best-laid plans he found it impossible to escape the effect of this moment on his commitment while he was <u>in</u> that moment. Both of these elements of temporality would appear to be relevant when thinking about the role of time in practising.

The different stages of a timescape appeared helpful in drawing attention to another aspect of non-linearity, the *relative* experience of time. The boundary of a temporal stage, however it may be established, delineates a distinct temporal experience. The subsequent stage not only involves its own temporal experience but is also experienced relative to the stage that went before. An example of this might be the transition out of the initial 'glow' stage of the programme. As respondents walked away from the plenary room, their minds also began to wander onto the set of tasks of the next stage. Only a few minutes may have passed since the calm setting of the programme plenary room but this period was potentially populated with multiple forms of interruptions, orientations, variety in pace etc. This sudden, relative experience of time, would appear to have a crowding-out effect on things that were considered important in the previous stage. Bluma Zeigarik recognised something similar in the activities of Parisian waiters (Syrek et al., 2016). These waiters could hold significant amounts of information about client orders in their head for a particular period until that order was completed, a moment that allowed them to dispense with what was known about the previous order. While not in any way suggesting that all the knowledge acquired on the programme is lost in a few moments after a programme, the relative experience of time in these boundary

situations (e.g. between contexts) would appear to have an impact on 'things' that were deemed important in a previous stage (e.g. the programme is over, I have 'got' my knowledge and I now need to get back to real life!).

At the March 2018 *Impact* programme, I experienced something similar to this phenomenon with the Senior Sponsor. He had joined the last day of the programme to gauge the mood among participants and judge their reactions to the event. This was very important to him as the programme had high visibility among Forum management (e.g. the people he ultimately reported to). As a consequence, he was highly engaged in the programme throughout the day. Within minutes of the programme ending however, and after it was clear from the evaluations scores that the programme had been a success, I could see the Zeigarnik effect work out in front of my eyes. Like the Parisian waiter the programme was now 'complete' and it was time for him to move on. We had agreed to chat after the programme but he was clearly distracted and as I walked with him trying to catch his attention he answered his mobile to tell an expectant meeting colleague that he was '2 minutes' away. Myself, and the programme, so important to him only 15 minutes earlier, were no longer his main focus. Just like the waiter he had moved on to his next set of 'orders'.

Reframing the post-programme context as a timescape has theoretical implications. Incorporating temporality more formally into a recontextualisation approach (Allan et al., 2015) would appear to add fresh momentum to the concept, explicitly addressing a key contextualisation process that can easily be overlooked. Shining a temporal lens on these processes creates an opportunity to see the effect of a broad understanding of time in putting knowledge to work. This conceptualisation of time also resonates with emerging process methodologies. Temporality is often presented as the central, defining feature of process (Langley et al., 2013) but the definition and nature of time employed in process studies is surprisingly limited. This definition, primarily linear in nature, misses out on the richness, nuanced and experiential connection of non-linear dimensions. Incorporating a wider lens on time has the potential, I would suggest, to add significantly to the field.
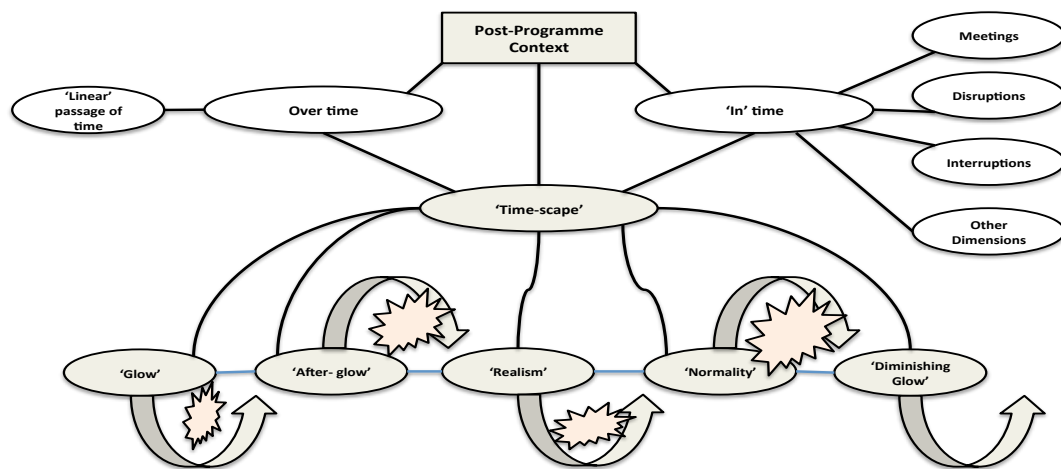
Figure 7-4   Thematic Map of the temporal stages - Post Program-Process (PPP)

Figure 7.4 seeks to capture the experiences of living 'in' and 'over' time in the post – programme context. Within this context, dimensions of both linear and non-linear time feed into the construction of a timescape. This scape is presented as a series of bubbles each representing a different temporal stage. These bubbles exhibit a linear and non-linear relationship with one another as well as the potentially powerful relative impact of boundary moments.

Seeing the post-programme context as unfolding stages also has practical implications. Often the guidance to participants at the end of a programme is to 'make time' for practising commitments on their return to work. Changing this advice to give a more realistic portrayal of the post-programme setting, where the act of practising is recognised as differentially challenging, is likely to resonate with programme participants as more realistic. This was recognised by one PPP respondent who lamented his experience of traditional post-programme planning (after *Impact*) as being crude and unrealistic. There is a potential need for caution here however – as was evidenced during the Prior Phases; illuminating the full implications of 'times' on people's lives does not always produce the intended results.

Following the PPP interviews, I sought to incorporate aspects of the findings on post-programme stages into a separate session on the May 2019 *Impact* Programme. This led to mixed results. A version of this session had been a successful addition to *Impact* over the previous year sending a strong signal to participants that the faculty had a realistic understanding of post-programme challenges. In March 2019 I enhanced the session with a detailed account of the stages (from the PPP findings). During the session I outlined to participants the likely experiences they would encounter at various stages when they returned to work. After 2 or 3 minutes I felt the room go quiet. When I ended the segment one participant said 'Well, what's the point in even trying?' There were mutterings of support from his colleagues. Similar to the initial effect of the Tool during the Tool Pilot interviews this instance seemed to display the fine balance between empowerment and disempowerment. Making reality visible to participants was useful but it needed to be seen alongside legitimate hopes for intentionality on the part of the respondent. I captured the reaction in the note for the session written up the following day.

- Good session on implementation but was I leading them to the belief in a silver bullet (xxx comment) so be careful about me building up to my flourish
  - Also was there too much there – how much is too much?
  - What are the key phrases? More impressive when I did not have the data
  - Don't disempower them

7.6.2.   **Theme 2** – 'Temporal Contradictions'

A range of temporal contradictions unfolded in the lives of the respondents over the course of the three sessions. These contradictions are outlined below in the way they were most often represented, as a series of binary trade-offs.

7.6.2.1.   *Meetings versus real work*

With schedules full of meetings there was a belief among the majority of respondents that there was no opportunity to get 'real work' done. Similar to the Prior Phases, although meetings often played a central role in facilitating the day-to-day activities of respondents, 'real work' appeared to be defined as those (current) obligations, responsibilities and deliverables that did not involve some form of meeting commitment. No respondent made a positive comment about the availability of non-meeting time.

The time that you <u>really</u> work for two hours and even one hour uninterrupted on any subject, is very rare.

7.6.2.2. Practising versus real work

It was common for respondents to imply that the act of practising their change commitment was itself not real work. Even when time was specifically allocated to practising, this slot could be trumped by something or someone deemed to be more immediate or important. In addition, the time devoted to practising did not appear to be valued in the same way as the time for routine, immediate task-related activities. This meant that practising as an activity could be relegated to some future, more appropriate time. As a consequence, respondents often found it easier to speak with conviction about their plans and intentions to practise as opposed to actually doing it.

Even as I am planning to do stuff I can say to myself, but that's just my [Change Commitment]. I will do that later. The hounds are nipping at my heels so why don't I do that instead

More broadly, respondents tended to make a distinction between operational and strategic work, with practising fitting into the latter. There appeared to be a sense of reward associated with delivering on immediate operational tasks. An on-going

dilemma for respondents was how time could be allocated to practising when the 'pull' of immediate gratification was so powerful.

I had one day out and the inbox was full. There was a pull towards what I would call the immediate, superficial, easy, operational stuff. Your ego gets a pat on the back because you give some stuff to people who wanted it and got a kick from a task

A number of respondents made a distinction between 'shallow' and 'deep' time. Shallow time was the normal everyday use of time where the respondent was in operational mode. Deep time was qualitatively different. It needed to be ring-fenced and protected from the seductive encroachment of immediacy so the respondent could think, reflect and act at a more reflective level.   This tension was illustrated in a conversation a respondent recently had with her boss.

I was drowning and I had a conversation with my boss – how do we carve out that time to have the deep-time thought? And what she has challenged me to do… requires time out, something very different from how I spend my normal (time)

7.6.2.3.   *Individual performer versus enterprise leader*

Many conversations returned to how a respondent's current role was defined by a set of skills, knowledge and capabilities that had developed over the years. Moreover, mastering these skills had made them good, often very good, in these existing roles. To change meant moving into a position that required qualitatively different skills and capabilities. This did not happen overnight and a decision to change invariably projected the respondent into a space where they had to start operating under new <u>and</u> old rules.

My boss said, this is the perfect job for you (at this stage) because you cannot do it all by yourself. In the past you could lead by example and you could get into the weeds. This role, you cannot do that.

The majority of respondents appeared to be in a live state of flux and transition in their careers. This period lacked the certainty, familiarity and comfort of their previous roles. Many found themselves lost as they sought some way of mapping the route in front of them.

We are constantly in a state of evolution. And it is not a steady state and I crave that. What is my value? And therefore my schedule is in a state of flux and my time is in a state of flux. I keep thinking that (something steady) is just around the corner…

7.6.2.4.   *Current versus future self*

For many respondents their change commitment had clear identity implications – it seemed to touch something fundamental as to who they were (as a function of their current role) and who they could be at some stage in the future. This prompted an existential moment for one respondent. To proceed with the commitment meant that the narrative she told about herself had to change and she wondered if she was ready for this.

Part of the challenge for me, to be candid, is answering that question about who I want to be.

Personal narrative came out as a strong theme in the interviews. There was a tension for some respondents between seeing their change commitment as an isolated activity or something that fitted within a wider, more fundamental reappraisal of the story they told about themselves. One respondent called this the process of 'repurposing', addressing the very basic rationale and logic around how they saw and defined themselves at work.

I am trying to do a bit here and there but it is not structured, I do not have a clear overriding view. Yes, this is what I have not done. I have not repurposed.

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Three respondents recounted in detail how venturing into new territory in their careers went against their 'instincts' - their preferential style that had been carved out over the years and where they were most comfortable.   One respondent explained the practical reality of change for her day-to-day behaviour, and how this change was so uncomfortable.

I need to overcome the instinct to deal with the immediate, the comfortable….do you know Barry it goes against every grain of my being. But I need to do it.

7.6.2.5.   *How I am seen versus how I want to be seen*

Contradictions were not just an individual concern. Other colleagues were very often important in how respondents were seen and understood at work – what a respondent <u>did</u> contributed to their 'story' and how they were seen by themselves and others. A personal change commitment often raised question marks for the respondent's colleagues about why that respondent was acting differently and how, as a consequence, they should relate to them. This highlighted the challenges that respondents encountered in engaging in new practices while also doing the established practices associated with their current role.

I told my line manager (about the change commitment). I told a couple of my closest colleagues and they are ok with it but they seem a bit frustrated and try to pull me back to what I was doing before.

As the sessions progressed, it was clear that tensions pulled at respondents from every angle. As middle managers, most respondents sat at the crossroads between junior ranks and senior management…with all the tensions and contradictions that that position implied. Sitting in this spot often involved interruptions from direct reports, the expectations of peers and a call from senior management when an issue

arose. As a consequence, many respondents felt the need to engage with the 'detail' of every task 'just in case'.

My boss said…you are in a really difficult position because you get it from the bottom up and the top down!

7.6.2.6.   Theme II - *Discussion*

The contradictions unfolding in the post-programme context often represented multiple, sometimes simultaneous dilemmas for respondents.   While these contradictions clustered around two dominant themes ('real-work practices' and 'role and identity') they always had strong temporal roots - each conflict represented a moment of choice for the respondent. This entailed a decision for the temporal status quo (e.g. doing some practice that had been done many times before) or electing for something that was new, different and required unfamiliar practising. The 'pull' towards comfort and familiarity felt by many respondents in these moments seemed to squeeze out the act of practising.

The exact nature of temporal contractions would appear to be specific to a particular community. In this study the cluster of contradictions was intimately related to the stage of career of the typical respondent (Goldsmith, 2008). Being in transition, from an early-career specialist role to a mid-career enterprise leadership role, presented multiple dilemmas as to how respondents perceived their time should be legitimately spent. As noted in Chapter Two, these tensions were further accentuated by the ambiguous nature of many of the transitions e.g. lateral, cross-business, 'Global' moves as opposed to the traditional hierarchical moves (Caligiuri, 2006; Caligiuri & Tarique, 2012). That said the contradictions outlined in the PPP echoed many of the temporal tensions already noted in the literature (Porter & Nohria, 2018).
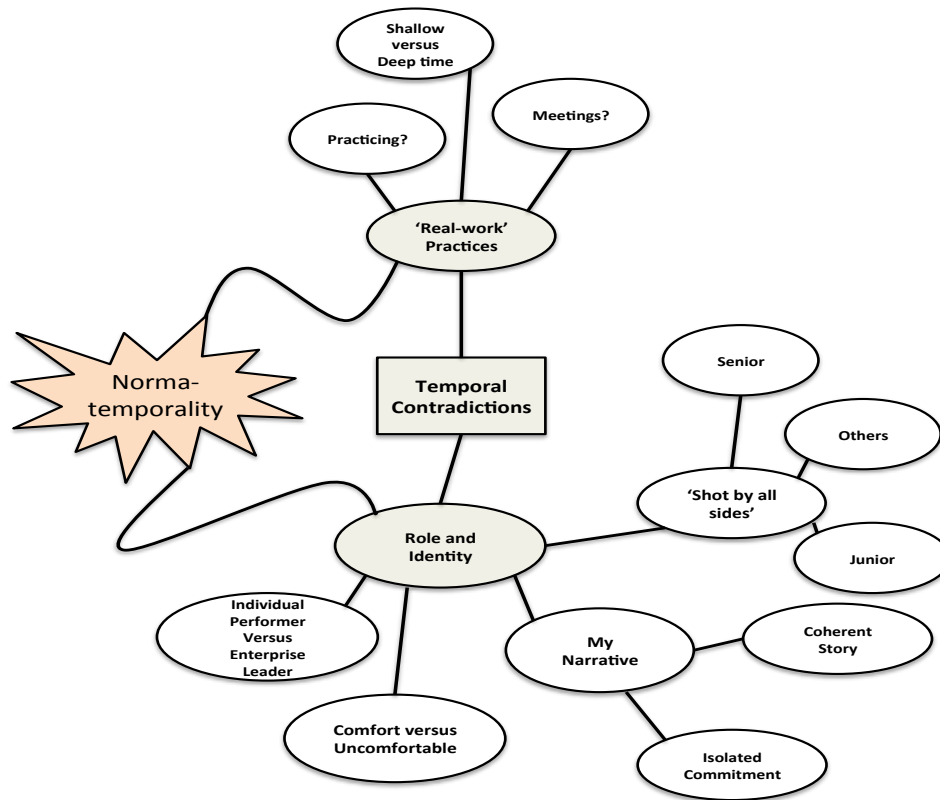
Figure 7-5 Temporal contradictions and norma-temporality in post-programme context

Once again, the legitimate use of time (e.g. 'proper', 'right', 'real' time) came up as a consistent and powerful theme. The findings would appear to suggest that time, normality and practices are intimately linked in some form. In particular the veil of legitimacy that hangs over certain types of times seems to have implications for those times we think we can act upon - if certain times are seen to be legitimately associated with certain activities in our lives then it becomes difficult to challenge these activities. This phenomenon links to the concept of chrono-normativity (Riach et al., 2014) and in particular, norma-temporality (Krekula et al., 2017). In essence norma-temporality suggests that there are right, appropriate and legitimate times to engage in certain practices. This concept would appear to help in illuminating references to time that were judged to be 'right' or 'proper', and how these times enabled, or more

frequently, constrained practising. These comments echo all the way back to the first set of Tool Design Interviews and have been present in the responses from the start. Recent research has pointed to the powerful judgement component present within the concept of norma-temporality (Wanka, 2020). This component, the subjective element that makes a particular time feel right or wrong, would appear to hang over a change commitment in some way. This is helpful in explaining the intentionality paradox that seems to befall most participants after a programme (e.g. how someone could rationally intend to practice a change commitment but simultaneously seek to disable this commitment in some way via the norma-temporal 'veil' that overhangs it). This felt sense of norma-temporality is captured in Figure 7-5 as a warm coloured star that connects the two organising categories of "Real work' and 'identity'.

Norma-temporality would appear to have significant implications for the nature of this study. It supports an approach to post-programme practising that makes the link between practices, time and legitimacy both visible and explicit. Failure to appreciate this link would appear to leave deep elements of identity unchecked. This is addressed further in the next theme relating to temporal practices.

7.6.3. **Theme 3** – 'Temporal Practices as (deep) vessels of Identity'

The PPP highlighted the engrained role of temporal practices in enabling and constraining the conditions for disciplined practising of commitments.

7.6.3.1. *Opportunities to practise*

Finding opportunities to practise a change commitment would appear to be a basic prerequisite for undertaking the act of practising. For a number of respondents there was a clear mismatch between their plans for change and opportunities to practise that change in their daily circumstances. Stated simply, some respondents clearly did not have opportunities to meaningfully practise their commitment. This (significant) constraint applied to two respondents in particular.

In the kind of field I am in sometimes these (opportunities) are not that frequent. So I am waiting for the next opportunity. I am expecting this in the last week of October.

Furthermore, respondents did not operate on a blank sheet in relation to their work practices – any change commitment had to fight for time with the existing practices of a normal temporal regime. Often the routines of this regime appeared to be carved deep into the identity of the respondent. This depth only became visible for one respondent when he tried to move away from his established way of operating; in the process he referenced the pure physicality involved in the act of practising.

It is not easy. It is uncomfortable (to do something new). It gives me a stomach ache.

7.6.3.2.   Evolving practices

Echoing a theme from the mini interviews it was clear that not all 'time' was valued equally by respondents. While it was easy to plan the practising of change commitments when the world of the respondent appeared to be in a steady state, this state of temporal steadiness did not seem to be the case very often. A day could be turned upside down at a moment's notice and this often occurred when a member of senior management needed something done. These were the moments when new practices, and practising in general, were most often challenged. This is what one respondent called the 'real' test of time.

I really like that in the tool. Those 'splats' you get a call from day care or from your boss and half your day is gone.

As time passed, all respondents experienced some form of fall-off in their ability to practise between session 2 and session 3. Something that appeared helpful in these cases was to accept that temporal deterioration was inevitable and that practices needed to 're-energise' and evolve in some form if they were to stand the test of time.

This approach seemed to work well as it provided respondents with permission to revisit past commitments and see what needed to be done to give them new momentum. As a consequence, what became known as *temporal energy* was a useful way of reframing reengagement with diminishing commitments.

I was struggling but it really helps me if I spend some time thinking about these things and knowing that it is not wrong to have to give something added energy especially when things are going bad for me

For those whose practices became a routine by the third session it appeared that my role faded somewhat and the practices took on some inherent merit and momentum of their own.

Yes I don't sit down every morning and say recall my last conversation with Barry. It is just something that I find useful to do now.

7.6.3.3.   *Blocking time for practising*

The most common strategy employed by respondents was to 'block out' time for practising in their diary. This was usually achieved by ring-fencing a period that could be used for some form of reflection about their change commitment. There was a pattern however as to how these periods would normally appear in diaries. Usually they occurred first thing on a Monday morning or last thing on a Friday. The logic outlined for this was that these periods would give the respondent time to think about (and plan) the week, or to reflect on how the week had gone. In most cases these periods lasted 15 or 30 minutes and very occasionally for an hour. Most instances of blocked time were one-off in nature - a minority of respondents blocked off time two or more times a week.

Well what I have done now is put in some time on Monday Morning, 8:30 -09:00 I put the time slot in with the objective of looking at the calendar of the week

In general respondents deployed a range of tools to help protect blocked-out time. Almost all looked for a quiet space away from their desk while more than half sought to find time somewhere outside the office environment e.g. at home, a café or the gym. One respondent developed ways of distinguishing different types of reflection time by colour coding these periods in his diary. The prevalence of certain colours acted as a warning sign to him about how he was spending his time.

And I colour code those blocks – external meeting blue, some red. Green is for me. IF there is no GREEN time in there then I have a problem.

How blocked-out time was used was a key issue throughout all the sessions. While it was challenging to ring-fence time in the first place, there was usually another issue as to how that time was employed. Once the ring-fencing had occurred, most respondents still felt the need to use the time to be more effective and efficient in their current role. The thought of investing time in their future selves was often very challenging.

That is very interesting Barry actually. One of the insights I got from this call is that I have been so taken up on my effectiveness and prioritization based on today. I was not thinking of it from a 3-5 year perspective. Where I want to be.

In order to counter the pull to current practices, the terminology I employed shifted over the course of the sessions – I moved from talking about time use to time prioritization. In doing this, one question appeared to be highly effective in highlighting this distinction: 'What does your current time use say about what you value?' In employing this question it proved helpful to link practices and the use of time to the identity of the respondent. Building further on an additional phrase ('What got you here won't get you there') proved particularly resonant with respondents – one respondent sent a photo of this phrase written on the partition beside her desk (Figure 7.6). In the final set of sessions, I developed this phrase further into a three-stage maxim based around 'Cogito, ergo, sum'. I modified this saying to

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the following: 'you are what you do, what you do is how you spend your time and how you spend your time indicates what you value'.
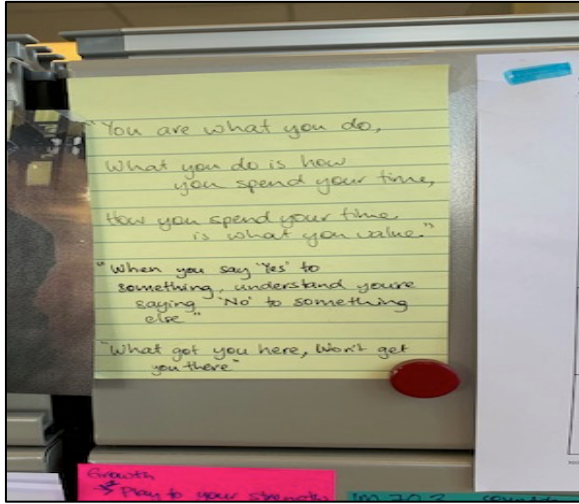
Figure 7-6 The note on a respondent's desk using the mantra from the PPP

7.6.3.4.   'Intellectual' practices

There was often a paradox in how respondents saw their relationship with practising. While many found it challenging to act on change they seemed to have an intellectual desire to understand more about the process. This had implications for the nature of my role. During the first session I positioned myself mostly as an enabler of conversations with respondents. As the sessions progressed I found that my role evolved – I became as much an educator as an enabler. I provided additional readings and information to respondents, something that helped place many of the PPP discussions in a wider, often more meaningful, context.

This is resonating with some stuff that I have been contemplating and thinking about. Do you know the book by Stephen Covey?

7.6.3.5.   Consciousness of practices

Across all three sessions, *being* deliberate was a significant theme for respondents. There was general recognition of the need to be conscious, intentional and deliberate about the use of time. There was an issue however. While respondents frequently referenced the importance of *being* conscious, the evidence suggested that they struggled to find the time for such deliberate moments. In many cases this challenge appeared to be related to the interruptions, distractions and commitments that defined the flow of their lives. In the third session I proposed a 'prepare-practice-feedback' model for practising commitments. This involved spending time before an act of practice to prepare, and time afterwards to capture reflections. These reflections could then be incorporated into the next act of practising. While this proved successful with three respondents the majority found the temporal discipline too much of a challenge.

That makes sense. Sounds like a very pragmatic approach, a two-part approach. But I have dropped the ball here. I went in unprepared and made a mental note why this happened.

7.6.3.6.   Discussion

The PPP findings suggested that the link between temporality and practices (Moran, 2015) was powerful but also finely engrained with elements of identity and self. Respondents did not practise their commitments in a vacuum - they already had an existing timescape of practices, developed over the years that said something about who they were and what they valued in their roles. In essence the history of the respondent to date, personal and professional, was tied up in these practices and carved into their chrono-normative rites, rituals and routines (Reynolds & Erikson, 2017). These temporal practices were deep vessels of identity for the individual respondent.

If temporal practices were central to identity, then by definition they must also be crucial to reshaping identity. This was easier said than done. In particular, the use of

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the tool highlighted two issues that appeared to reinforce the interlinked nature of temporality, identity and practices. First was the simple need to create time for practising which proved consistently difficult for respondents. Even when time was allocated this most often was a short, singular event squeezed in at the start or end of the week. The impression given was that time was offered up grudgingly in such a way as to allow the respondent to return to their 'proper' work as soon as possible. Even when time was specifically allocated to practise, the content of that practising usually focused on the respondent's current activities. This practising slot was seen as an opportunity for the respondent to be more efficient, effective and productive in their current role. Once again the pull of current identity to temporal practices was very strong.

A recurring theme in this study to date has been the challenges in finding time for formal reflection. Reflecting in action (Argyris & Schon, 1978; D. Schon, 1984; D. A. Schon, 1990; D. A. Schon & Argyris, 1992) is a popular concept in the literature but for many respondents it felt like a poor substitute for 'proper' reflection. These descriptions also sat awkwardly with my core Meadian perspective (Mead, 1967; Mead et al., 2015). Mead championed the moment of interpretation ('i'), a moment, he suggested that sat between the automaticity of stimulus and response (Flaherty & Fine, 2001). Crucially this moment, in Mead's eyes, enabled choice for the individual actor and introduced agency into behaviour. There was little visible evidence of the moment of interpretation in the interviews. Fuelled by temporal settings that were full, interrupted and fast paced, the space for 'i' between stimulus and response appeared to be increasingly diminished. Furthermore, it often felt that the *Impact* programme underpinning the study had provided the 'glow' of interpretation for many but the post-programme context acted to extinguish that glow.

More positively the PPP appeared to have a role in re-introducing Mead's moment of 'i' into the post-programme context. Unlike individually-focused, coaching approaches it provided a dedicated liminal space (Larson, 2014) for temporal experimentation and recontextualisation. As noted in Chapter Four recent work in the field of recontextualisation has highlighted the importance of liminality (Allan et

al., 2015; Fettes et al., 2020). The potential rigidity of the link between temporality, identity and practices would seem to reinforce the need for a formal temporal process similar to the PPP that allows a space for explicit temporal recontextualisation.   The PPP appeared to provide the opportunity for some respondents to break with an episodic framing of their practice commitment (e.g. a repeating act of the same practice), creating instead a cyclical process of preparation, action and reflection around their evolving act. While this type of cyclical process represents good practice, the crucial ingredient was constantly seeing the cyclicality through a temporal lens.   This was another moment when temporality and recontextualisation appeared to logically link with one another.
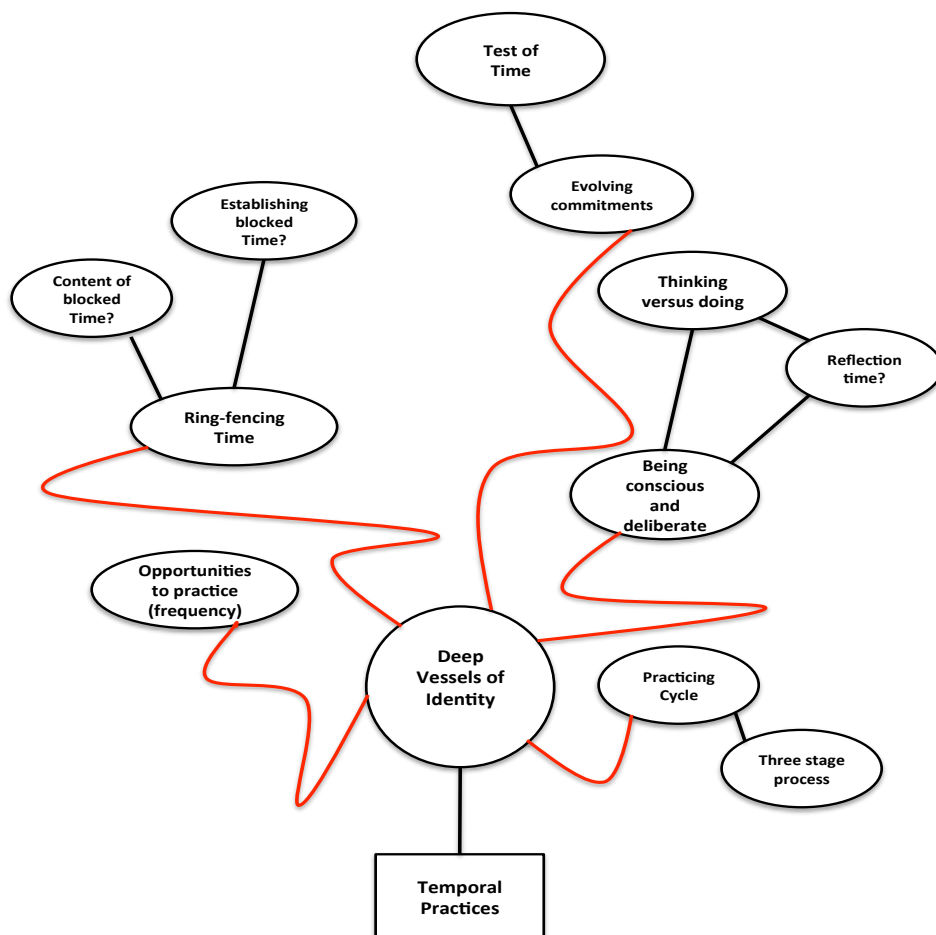
Figure 7-7 Thematic Map of temporal practices and the link to identity.

I am grateful to my MSc student Sarah (anonymised) for the logic behind the use of colouring in Figure 7-7. When I asked her opinion on a similar map during office hours she reflected on the metaphor of the 'Vessels (of Identity)' and wondered about its implications.   Where I had seen the vessel as a container she made a bodily connection – identity, she said, was like a series of vessels that gave life-blood to the other elements of the map. It reinforced and fed these elements. Given this connection to life-blood it made sense to her that these connections should be visually represented in red.

7.6.4. **Theme 4** - 'The temporal shadow of others'

It became evident over the course of the PPP that respondents did not practise their commitments in isolation - 'others', at various levels played a key, often hidden role, in a respondent's *individual* change commitment.

7.6.4.1. *Managers*

Three respondents noted the role that they themselves had in modelling behaviours for others in their work group. These were not isolated activities however. In general, there appeared to a virtuous aspect to this process of modelling – the managers of a number of respondents were themselves alumni of the programme and so a critical mass of people associated with *Impact's* approach to post-programme support was developing in the workplace.

Absolutely I am happy to do this. It is the power of the domino effect. The more others understand, the more we can pick up from others.

Managers and supervisors appeared to play a positive role in supporting respondents. While it was a prerequisite of programme attendance to reconnect with a manager after the programme, most respondents did so promptly and the nature of the engagements seemed to be specific, fruitful and supportive. There was also evidence

that some managers provided hands-on support in the practising of commitments. As noted, many managers had previously attended the programme and appeared, as a consequence, to be more engaged and supportive in the process. One participant was not so lucky. The challenging nature of her relationship with her boss highlighted the negative impact that such a relationship could have on post-programme application and development.

I have a very complicated boss….so it is an up and down thing (practice). Whenever he is away it is easier.

7.6.4.2.   Colleagues

Echoing a theme that emerged in Prior Phases, it was clear that respondents did not practice their commitments in isolation. In working lives dominated (and often defined) by a sizeable number of meetings, commitments and interruptions, the multiplicity of interactions seemed to act as a conduit for the expectations and demands of others. This appeared to cast a 'shadow' over the temporal independence and sovereignty of many respondents. A growing recognition of this shadow led some to be more intentional in seeking to re-gain control of their time.

How do I organise myself in respect to other people's interactions in order to have the time – I need to bring them along or align with them.

The need to align with others when practising new commitments was important; as noted in the Prior Phases, failure to do so often led to confusion in the minds of colleagues as new ways of operating were judged to be strange and 'out of character'. This prompted an attempt by a number of respondents to put new behaviour and practices in context for others. Paradoxically this need for alignment had to be seen alongside a fear of transparency. In particular there appeared to be limits to the extent that respondents were willing to share their change commitments with others, especially more junior colleagues. While respondents were encouraged (but not

obliged) to share commitments after the programme, there was a noticeable reluctance to be transparent about these. In many cases it was not until the second or (more likely) the third session that some degree of sharing took place.

Yes I finally shared my commitment with my team, literally unfolded my paper and shared my commitments, and spoke through those. This helped tremendously; they have called me out on some stuff.

There was some evidence that respondents supported one another in the two months after the programme. When this did happen, it appeared to be on an individual, ad-hoc basis. Some of the respondents, usually acting in teams, made plans during *Impact* to stay connected via a WhatsApp group however many of these plans appeared to be work-in-progress throughout three sessions.

I was able to meet up with N and we had a good engagement on one of the projects that he is working on.

7.6.4.3.   *Researcher - my role*

There were frequent references to the obligation many respondents felt about reconnecting with me during the sessions. This was seen as a useful way of staying accountable to their commitments and providing an opportunity for on-going reflection and feedback. The nature of this external 'pressure' felt by respondents appeared to be more sporadic than continuous (e.g. related to a pending conversation as opposed to a constant backdrop to on-going activity).

What has been keeping me accountable is checking in with you. I still had my poster chart. But I had to pull it out last night knowing that we had a call

7.6.4.4.   Personal

While there was a reluctance to share commitments with work colleagues there seemed to be greater appetite to do so with life partners and immediate family. Respondents often made a connection between their programme/work commitment and changes in their personal life. For some the boundaries between professional and personal were permeable and their commitment had deep and often far-reaching potential for change. This aspect of personal sharing was referenced by 8 respondents, over 30% of the total, during the PPP.

I had to present this to my wife when I came back. She is 3.5 months pregnant so the whole activity was crazy and she started critiquing me.

7.6.4.5.   Organizational

The wider dynamics of life at Forum appeared to have an impact in enabling and constraining individual change commitments. For some this was tied to the stage Forum was at in its annual planning cycle (e.g. year-end) or more broadly, a shared cultural understanding of 'how things get done around here'. Once again however, seeking to practise an individual change commitment brought others into the change equation.

As a company we have this orthodoxy that the busier you are the more value you are adding

7.6.4.6.   Discussion

One of the most surprising findings from the PPP was the role that 'others' played in the temporal profile of a respondent. Respondents did not appear to practise their commitments in isolation - others, at various levels, and to varying degrees, enabled

or constrained their commitments. These 'others' acted as a temporal shadow over practices and practising.

At one level this was not surprising. There were 'obvious' others that appeared in the findings – those that we would expect to see and that are covered in the existing literature e.g. managers and faculty (Ford et al., 2018). It also highlighted how the less 'obvious' others were omnipresent but often overlooked. Every meeting ('block') and every interaction ('dot') that appeared on the visualisation tool represented an interactional expectation from a third party. In some cases, these interactions acted as enablers to practising (e.g. a helpful manager) but in many cases they were reported as constraints (e.g. 'I need to respond', 'it's the same for all of us'). The individual was not alone with their change commitment - others expressed their expectations of the individual through various forms of interruptive temporality.

The type of context inhabited by a typical Forum respondent made interruptive temporality particularly relevant. This context was very different to that occupied by the 'good practiser' often portrayed in the literature e.g. concert pianist or an elite athlete (Ericsson & Pool, 2016; Macnamara et al., 2014). A pianist or athlete routinely has the capacity to shut themselves away from others and practise in a disciplined fashion. The respondents in this study rarely had that luxury. Their professional lives were defined by relationships that elevated the role of interactions and connectivity (Wajcman, 2015; Wajcman & Rose, 2011). This is not the isolated, a-contextual substance model of the individual implied by Transfer accounts. These are actors that cannot escape their context. Interaction is part of their identity and role.

Mead is helpful in making sense of the link between interaction and self (Mead et al., 2015). Many respondents appeared to have incorporated a strong sense of the *generalised other* as a central aspect of their identity (Gillespie, 2005). This was an identity that had developed over the years through an on-going process of role-taking (Tillman, 1970). In the early years of their careers, these respondents had learned the ropes of the job as technical specialists. Becoming more experienced, they experimented in these roles and now were established players in the game of

everyday working life (Ibarra, 2015). This latter stage however came with expectations and demands. Breaking away from these expectations was hugely challenging for respondents. It required the involvement of others in the change process that allowed the respondent to legitimately experiment with new roles and different temporal practices.   Once again this called for some form of liminal space, but a space that extended beyond the sole presence of a narrowly conceptualised individual. One example of this was the case of the respondent and his manager who, prompted by the PPP, collectively renegotiated their roles. The manager recognised that a meaningful change for the respondent <u>also</u> changed her role and how they related to one another. This had a positive impact. The shared change enhanced their mutual focus on a business opportunity and delivered significant returns for Forum.

While Mead was helpful in identifying the crucial role of the 'near' other, there were signs that this level of analysis did not go far enough. Within the findings the *temporal shadow* cast by others (e.g. the expectations and demands that enabled or constrained new practices) clearly operated at the intra and inter individual level. But wider temporal norms, at an organisational and societal level were also operating. These acted to underpin, and legitimize the intra and inter-individual practices e.g. it was acceptable to ping someone, send them an email or come by their desk because that was the way things got done at Forum. This suggested that a broader level of analysis was needed to appreciate the full extent of the temporal shadow cast by others – Doise's levels of explanation and understanding were helpful in crystalizing this view (Doise, 1986; Doise & Valentim, 2015). The need for a wider level of analysis became an important part of my thinking as the process of understanding developed.
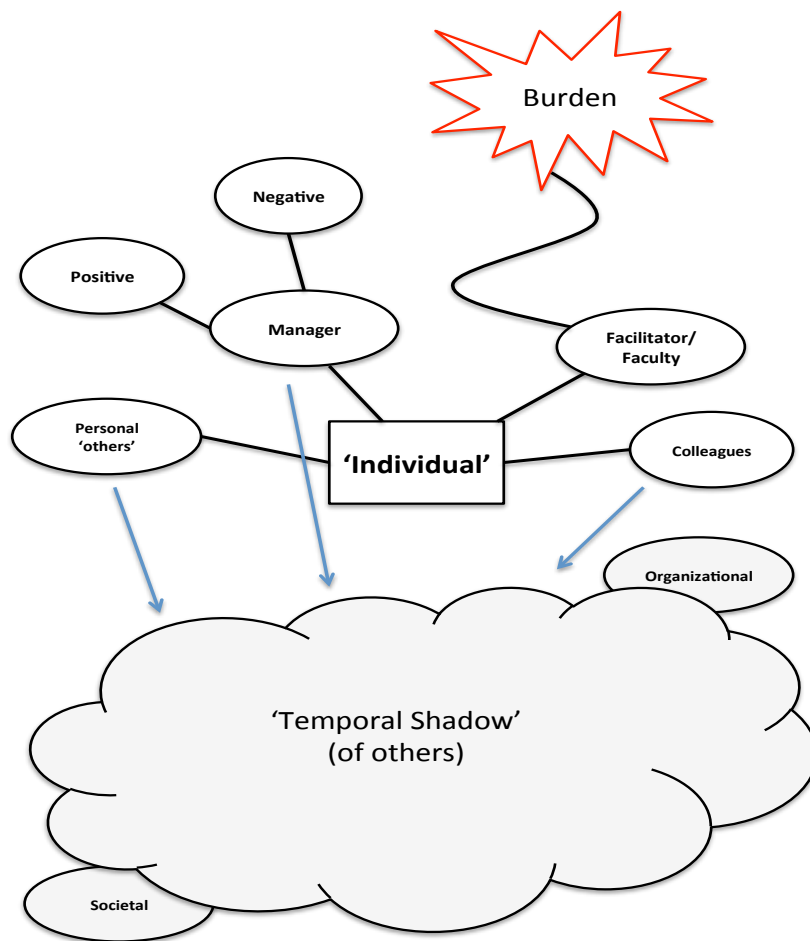
Figure 7-8 Thematic Map of 'Others' - Post Program-Process (PPP)

Figure 7.8 captures the 'individual' surrounded by the *obvious* others in their life (colleagues, manager, personal etc). These others also feed into a large cloud that casts a temporal shadow of interactional expectation over the individual. This cloud in turn is fed by wider organisational and societal expectations that frame many of these interactions.

The role of multiple 'others' highlighted a key limitation of the PPP. Throughout the study, and particularly through the use of the visualization tool, I had sought to make a respondent's temporal context visible. The aim was to enable that individual to act differently, to create the conditions for disciplined practising by allowing them to 'see' the full impact of various temporal dimensions on their commitment to change. In

doing this however, I suspect the visual articulation of context stayed at the level of the individual actor. It did not consider, nor crucially did it include, relevant others in the process. This left a disproportionally heavy burden of change on the individual respondent, a warning that was noted with hindsight, during the Tool Pilot phase. Failure to incorporate others into the PPP (e.g. managers or direct reports) meant that my role as the facilitator also bore a heavy load throughout the three sessions. I was important in supporting the conversations, but for the majority of the respondents, I was also the single focus of those conversations. As this became the case, those that were most relevant to the daily lives of the respondent (e.g. manger, colleagues etc) were excluded - these were the people who would continue to send emails, 'ping' the respondent or change their schedule at a moment's notice. This raised an important question. To what extent was the PPP truly social in its current form? It felt as if the process operated efficiently at the first level of Doise's explanation (intra-individual) but missed out on broader levels. This was something that I recognised in my reflective notes. In hindsight, I suspect that that role drove a methodological flaw in the process. I will return to this further in the final section.

7.7. PPP: implications for understanding

The findings surrounding the four emergent themes changed my thinking about the role of time in practising change commitments. During the development of the tool (Tool Design, Tool Pilot and mini-interviews) the evidence suggested that the sheer volume of temporal dimensions had an effect on practising. The number of meetings and the extent of interruptions, often in combination with other dimensions and aspects of the participant's life (e.g. a changing leadership role), crowded out the capacity to practise. The findings from the PPP seemed to bring me on from this level of understanding. While the volume of the dimensions was important it looked as if the dimensions themselves were more complex. They were not neutral – they were shaded in some way with deeper meaning and wider consequences. In particular identity, in some shape or form, seemed to play a part in this shading process and linked the themes in various ways.
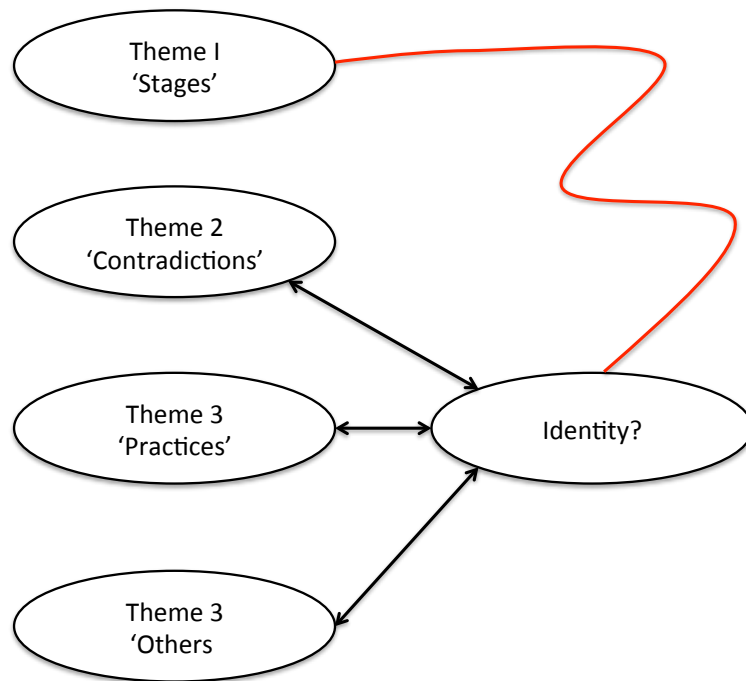
Figure 7-9 The emerging themes and the link to identity

As my thoughts developed on this front they started to have wider implications beyond the understanding of time. Most of all, they forced me to challenge my assumptions about the positioning of the Tool, the conceptualisation of the respondent and my own role in the PPP. Given the interlinked nature of these observations I will address them as I seek to integrate the findings in the final chapter.

7.8.   PPP: Implications for use

To this point the account of the PPP has been written largely from the perspective of the mountaintop. This is knowledge that aims to fulfil the requirements of an 'academic world' and advance understanding at a conceptual, theoretical and methodological level. But what about the other driver of the study – the use of this knowledge? In particular how did this description of the PPP support a *quality*

account (see Chapter Five) that incorporated considerations of use and ultimately enabled recontextualised knowledge (Evans & Guile, 2012) beyond the realm of individual practices? At the end of the PPP this became a live and immediate issue for me.

7.8.1.   Constructing mediated knowledge

By the start of 2019 I had become concerned about the momentum of my research at Forum. The PPP had been completed and there was now an inevitable gap for analysis and write-up ahead of this final submission.   From Forum's perspective however the 'results' of the study had been delivered and they were eager to act on these. The Senior Sponsor asked for a presentation of the results to the Human Resources Global Leadership Team at Forum. On the face of it this was a huge opportunity but I was reluctant to go ahead with this until I had analysed and understood the findings in greater detail. In rejecting the offer, I was also aware that opportunities for showcasing the research might be limited as priorities inside Forum would inevitably move on.

There was another, more fundamental issue that was concerning me at this stage. The basic aim of the study was to build a bridge between the perspectives of the mountain top and the swamp (D. Schön, 1984). The account in this chapter, written and presented largely from the perspective of the mountaintop, had been constructed in a language and logic suited to that context (Astley & Zammuto, 1992). If this study was to have any lasting impact, how could its findings be reshaped in a way that made sense at Forum, in the ontological and epistemological setting of the swamp? As noted in Chapter Five this has been described as the distinction between two 'thought worlds,' where each side sees, values and describes the same reality in different ways (Wefald & Downey, 2009). To bridge these worlds the study required an additional act of recontextualisation that produced a mediated form of knowledge.

7.8.2.   The award proposal: a vehicle for reconetxualisation

In March 2019 I was approached by the Senior sponsor at Forum and asked whether I would submit the results of the study for a Brandon Hall Global Excellence Award. The Excellence Awards are a global award for the learning industry that attracts entrants from leading corporations around the world. In 2018/19 submissions were received from 25 industries in over 30 countries. The aim of the awards is to recognize creativity and measurable results of learning in practice – this aim is summed up in the awards mission that states '*recognition that validates transformation'.*

The awards are allocated under a range of categories and this study was submitted under the elite category of "Best Results from a Learning Program'. The submission for the award was divided into six sections, each section addressing a set of pre-defined questions. All proposals were evaluated by a panel of senior learning industry experts, analysts and executives. The evaluation was based around five criteria: fit-for-need, design, functionality, innovation and overall measurable benefits. Each proposal also required an executive level sponsor at the submitting organisation - this was provided by the Global Director of Strategy for Forum.

The submission took four weeks to prepare. A redacted late draft document is included in Appendix C. Constructing the submission was an intense and challenging process but also one that was instructive in highlighting the practical complexities underpinning the active recontextualisation of knowledge. Three observations in this regard are worth noting.

7.8.2.1.   *The bridging power of tropes*
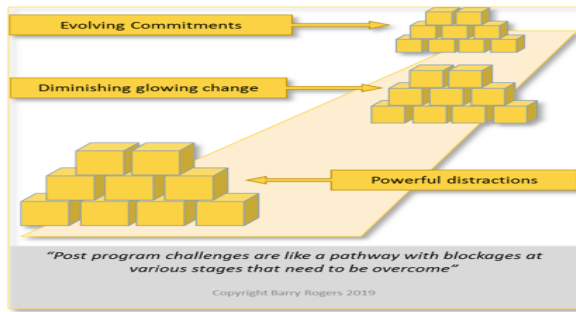
Figure 7-10 The post-programme context as a pathway with 3 blockages

It is debatable how much organisational stakeholders fully understand, or want to understand, the detailed nature of academic research carried out around them (Meyerson & Kolb, 2000). This study was no exception. While Forum stakeholders were always broadly supportive of the study, they could also passively exist alongside it for long periods (see Chapter Two). The submission of the award proposal changed this dynamic. The research became a priority to both sides. Central to this was finding a way to articulate the research in ways that bridged the gap between our respective ontological, and epistemological perspectives. Despite lengthy, often painstaking descriptions of many aspects of this study, the Senior and Junior Sponsors were constantly looking for ways of making sense of the research in their context. One such approach was through the use of metaphors and tropes (Lakoff & Johnson, 2003; Oswick et al., 2002; Sutcliffe & Wintermute, 2016; Weick, 2005). An example of this can be seen in the use of the visual in Figure 7-10. This portrayal of the post-programme context as a pathway, with three sets of physical blockages, connected powerfully with both sponsors. This simple visual metaphor seemed to act as a sense-making mechanism that expressed the nature of the challenges in the post-programme context in ways that were understandable and usable.

7.8.2.2.   *Authoring mediated knowledge*

Similar to other moments across the study, the submission process exposed the challenges of ethical negotiation (see Chapter Five). At one stage during the writing process, it was suggested by the Junior Sponsors that it might be helpful to present an aspect of the findings with a particular emphasis and focus. This sat at odds with

what I had originally heard from respondents and I held firm on my interpretation. While this moment was only a fleeting instance, it did, I would suggest, speak to something broader – who facilitates the authorship of recontextualised knowledge? For me It was crucial that I 'held the pen' throughout the writing of the proposal, ensuring that nothing was lost in translation as new knowledge was created (Flinders, 2013; Shearn, 2016; Sutcliffe & Wintermute, 2016). While this has no bearing on the ultimate destination and route of that knowledge, it kept the initial authorship of this mediated knowledge in my hands.

7.8.2.3. *The importance of an artefact*

Ultimately the submission process *produced* an artefact that represented shared knowledge at Forum. This document was a jointly constructed, agreed artefact, a common story around which there was broad alignment. Most importantly it was expressed in a language that made sense to all concerned and could be shared inside the company (Zilber, 2019). As a consequence I was struck how Mead's understanding of time had a reframing effect on the process of recontexualisation (Flaherty & Fine, 2001; Mead, 2002). On completion the proposal became an agreed definition of the past – in Mead's terms the document had renegotiated the past(s) of the study through the lens of the present. This subsequent use of the document inside Forum meant that this representation of the past became increasingly shared. This remains the case today. As of October 2020, the document was still being used at Forum's Global Learning department to illustrate to new and existing staff the importance of the post-programme context in their activities.

More broadly the process of recontexualisation surrounding the award proposal became a way of testing the practice validity of the research. It translated the study into a form that was ontologically, and epistemologically fit-for-purpose and in the process, opened it up to external third-party validation. The results of that process are outlined in the next section.

7.9. Evaluation

Following the final session of the PPP all 21 respondents received a short evaluation questionnaire via Survey Monkey. The questionnaire contained 9 questions (4 open-ended and 5 closed/scaled), was anonymous and designed to take less than 5 minutes to complete. 18 out of the 21 respondents returned completed forms (86%) with a typical completion time of 4 minutes and 40 seconds. A further 2 respondents provided verbal feedback. Screen shots of summary output from the evaluation are included in Appendix D.

7.9.1. Satisfaction rates

In recent years the *Impact* programme has consistently achieved scores in excess of 4.5/5 for overall satisfaction (e.g. equivalent to 'Very Satisfied'). The expectation was that the PPP should achieve a satisfaction rating that did not unduly detract from the *Impact* programme (e.g. 'Dissatisfied' or below). The PPP scored 'Very Satisfied' (70.59%) and 'Satisfied' (29.41%).

7.9.2. Engagement rates

Under the existing form of post-programme support, individual coaching follow-up was offered to all participants, with Forum management actively encouraging this arrangement. As noted at the end of Paper I the external coaches providing this support had established reputations, a combined experience of 30 years working with Forum and were consistently ranked highly in evaluations. Historically the level of engagement in post-programme coaching was less than 40%. The PPP sought to exceed this percentage. The PPP scored 92% voluntary engagement over three interactions. This broke down as follows: 96% (1st engagement), 92% (2nd engagement), (88%, 3rd engagement). In order to ensure a valid comparison with the existing coaching arrangements there was no encouragement to participate in the sessions from any Forum source, at any stage over the PPP. Furthermore, no session

reminders were sent to respondents e.g. the date for the subsequent session was set on the preceding call and there was no further contact until that call.

7.9.3.   Behaviour change

Respondents were asked a question in the PPP evaluation survey about their perceived behaviour change. To offset the limitations of a self-report, measurement data was checked against qualitative interview data and triangulated, where necessary, with third-party sources (e.g. managers). The PPP respondents reported 100% behaviour change.

7.9.4.   Change stories

Given the diverse nature of their businesses, Forum were interested in seeing how the PPP had facilitated change that met with the specific needs of individual respondents. With the permission of respondents three stories were captured from the interview data that was shared with Forum Sponsors. One such story related the experiences of a recently arrived employee and his attempts to integrate into the Forum network.

7.9.4.1.   *New ways of working:*

One respondent had recently joined Forum to lead for a new business in Africa. The respondent managed a small (50 people) 'start-up' that operated in a country where Forum had had a significant presence for over 100 years.

After the programme the respondent decided that he, and his unit, were not leveraging the other Forum relationships within the country. Specifically, he sensed that the way he was spending his time (micro-managing) was not optimal and was having a negative impact on the wider Forum relationship. During the PPP, the respondent became increasingly convinced that he needed to step back from the

detail of everyday business and work on the connection between Forum and his unit. In addition, what became clear to him was:

'This is what my leadership is all about…I am the one who will make this work'.

Feedback from colleagues reported a positive change in the nature of the relationship and increased trust between both sides in the 3 months after the PPP.

7.9.5.　Revenue contribution

Forum sponsors wanted a clearer appreciation of the link between *Impact*, the PPP and bottom-line revenue. While there was anecdotal evidence for this connection in the past, there was no hard evidence for a link. The hope was to capture examples of bottom-line profitability during the PPP, and to follow-up with respondents (and managers) in order to verify and validate any such contributions.

One respondent indicated early in the PPP that the process had changed the way he approached his external client relationships. This in turn was having significant implications for a business opportunity he was engaged in during PPP.

'The programme and the process are immensely helping me right now, if I didn't do it I could see myself as a headless chicken running around'

The respondent shared his area of focus on the PPP with his line-manager. With her support, they collectively crafted a set of engagements with a key client inspired by his PPP approach. In December 2018, shortly after the final PPP session he signed a deal based on these engagements. Following this, I was invited to meet with members of his line management (including his boss) at Forum's office. The manager confirmed the link between the PPP and the revenue contribution from the deal. Given the size and sensitivity of the contribution, the respondent gave permission for the Senior Sponsor to speak with his mangers to verify the claim. This deal represented an

incremental present value saving to Forum's operations in excess of ██████████
[**NOTE** to reader: This number is included to underscore the magnitude of the transaction but will be excluded from the final version of the submission filed with the University).

8. Contribution, limitations and integrated comments

Where do the findings of the PPP, and the study in general, fit in terms of the wider consideration of their contribution, limitations and implications?   These are the questions addressed in this final chapter.

8.1. Contributions to understanding and use

Contribution and impact are key criteria for contemporary academic research (Bullock & Hughes, 2016). This study sought to make a contribution by increasing understanding in its field and also achieving a practical impact. To do this, it positioned itself as *use-inspired* fundamental research (Stokes, 1997) that aimed to be close-to-*practices*. How successful, if at all, was the study in these efforts?

8.1.1. Contribution to understanding

There would appear to be five areas where this study has the potential to contribute to understanding across a range of literatures. In outlining these I will attempt to highlight both the general level of contribution, as well as the specific gaps and opportunities where the findings may have relevance. I will also outline some broader areas of contribution in relation to my discipline and the nature of the EdD as a distinctive doctoral experience.

8.1.1.1. *Post-programme context*

' We know that much happens to the individual trainee from the time they leave training to the time we measure transfer – however we rarely have investigated what happens during that interval'
(Transfer of Training: Known and unknown, 2017, p.5)

Chapter Three highlighted the limitations surrounding Transfer and its inability, as a field of research, to conceptualise the granularity of the post-programme context. This has left the period after programmes largely ignored in the mainstream literature, a situation the study has sought to address. More broadly the post-programme context has the potential to link to other areas that represent challenges and debates within the literature. This is especially the case in relation to the measurement and evaluation of formal programme learning. As documented, this is a field that is highly problematic both in theory and in practice (Blanchard et al., 2000; Brown & Sitzmann, 2011; Murray, 2019; Saks & Burke-Smalley, 2012; Sitzmann & Weinhardt, 2018). Shining a light on the granular experience of the post-programme context facilitates an appreciation of the diverse criteria that can apply to the success or failure of formal learning. The study sought to model this in the criteria used for the evaluation the PPP.

This research has approached the post-programme context from a specific perspective (e.g. through the lens of time). This however is only one, very partial way of seeing this context. There would appear to be scope to employ a range of different lenses and approaches that could bring added richness and understanding to the field. As an example, a political lens could explore the role of diverse stakeholders (internal and external to an organisation) in post-programme outcomes while a perspective on gender could unpack the trajectory of both the programme, and post-programme experience. Making the realm visible as a legitimate focus of enquiry opens up multiple routes for sensemaking.

8.1.1.2.   Recontextualisation

Recontextualisation promised a fresh approach to the conceptual and methodological issues associated with Transfer (Evans et al., 2010). Practically and theoretically the approach would appear to have delivered on that promise by providing valuable input into the development of both of these realms within this study. That said, I would suggest that there is the potential to refine the framework further by incorporating time more formally into its approach and analysis. While the potential for development exists across the four types of recontextualisation – content, pedagogic, workplace and learner – the study suggests that for the two latter categories of workplace and learner, recontextualisation may have the greatest immediate potential. Specifically the incorporation of *timescape* as a conceptual vehicle may be helpful in achieving this aim (Adam, 2008). In challenging the passive, linear metaphor of the timeline (Coulson & Cánovas, 2010), a *timescape* opens the potential for incorporating a wide variety of active temporal dimensions in putting knowledge to work. This has the scope to extend the field of recontextualisation, adding renewed energy and momentum to the approach.

8.1.1.3.   *Time*

Time has been a central feature of this study and there is little need to restate the general arguments for incorporating non-linear dimension into expanded forms of temporal analysis and sense-making. More broadly, much of the richness provided by a temporal lens comes from its ability to see taken for granted concepts in a new light. This was displayed in the analysis of the findings for the PPP where the concept of norma-temporality (Wanka, 2020) reframed the way we think about standard everyday practices. Central to this process is taking time seriously as an analytical tool - I explore this notion further in my final comments later in this chapter.

8.1.1.4.   *Process*

Process approaches represent a growing methodological strand within organisational research (Hernes & Maitlis, 2010; Reay et al., 2019) and have become increasingly popular in recent years (Lawrence, 2017; Lok & de Rond, 2012; Wright & Zammuto, 2012). As noted earlier in the chapter, this study has sought to address a number of specific limitations within the field. One involves the incorporation of non-linear temporality into process methodology. While time is a core feature of process research, the representation of time remains primarily linear in nature (Langley, 2019). This would seem to be a significant oversight and one that neglects the conceptualisation of time as an experienced real-world phenomenon. A second gap relates to the nature of organisational research undertaken by process scholars. The majority of process studies focus on macro issues of organisational life overlooking the micro role of embodied individuals at the level of day-to-day practices (Langley et al., 2013). Once again, this would appear to be a gap in need of filling. The calls to answer 'how' questions ring somewhat hollow if the concerns of real people are overlooked on a day-to-day basis. Hopefully this study makes an initial attempt at addressing this.

8.1.1.5. *Visualisation*

This research took a strong stance in emphasising the active performativity of visuals in the construction, maintenance and transformation of meaning (Kress & Leeuwen, 2006; LeBaron et al., 2018). While there is increasing attention being paid to the visual dimension in the social sciences (R. E. Meyer et al., 2013), there is a long way to go in recognising visuals as a core ingredient of scientific discourse and reasoning (Pauwels, 2005). This study has sought to assist in that shift by elevating the role of visual representation and emphasising the credibility of representation alongside data capture and analysis. Specifically, incorporating a *Pattern Languages* approach (Blackwell & Fincher, 2010) into the construction of diagrams has necessitated the development of a form of pattern analysis that has the potential to make practical headway with the concept (See Chapter Six). It has also highlighted the need to incorporate an additional conceptual element into Process and periodic design

through considerations of time in issues of pre-engagement (e.g. before-the-moment). These areas will be pursued further with the lead author of the *Pattern Languages*, Professor Alan Blackwell.

8.1.1.6. *Research and teaching*

A behavioural turn in the social sciences has had a significant impact on the nature of my discipline in recent years (Bogliacino et al., 2016). Coming from a sociologically informed strand of Social Psychology (Farr, 1996), it has become increasingly important for me to re-establish the roots of my discipline within my research and teaching. This study has provided momentum for that process in two ways. First, by seeking to capture the richness of context as a sensemaking lens in organisational life and second, by repositioning my teaching.

Habermas outlined a typology of human interests associated with different kinds of knowledge and methodology (Field, 2018). While important in outlining the drivers behind research, this classification may also contribute to an unhelpful form of dualism within the fields of social psychology and sociology. Fear of association with technical or practical interests can lead researchers to maintain a sense of distance from the complexities of everyday organizational life (Alvesson & Spicer, 2012). This in turn can contribute to a binary framing of issues that often reduces these issues to matters of equity or efficiency (Rapoport et al., 2001). This, I would suggest, misses the richness and complexity of practice contexts where human agents strive to navigate these polarities on a daily basis. This is what this study has sought to capture – the messy, often mundane, markers of day-to-day context that simultaneously enable, and often constrain embodied human agents. Failure to address the nuance of context potentially leaves the contextual realm to other, more deterministic interpretations (Dolan et al., 2010) and does a disservice to the discipline.

At an invitation lecture to LSE students and colleagues in November 2019, I made the case for increasing the focus on recontextualisation processes within organisational

research, as well as the need for proximity to practices in ontologically sensitive forms of enquiry. This, I claimed, touched on a rich and vibrant tradition within the LSE's intellectual heritage (Bernstein, 2000; Farr, 1996; Giddens, 2013). Echoing this call, the course I teach at the LSE, aimed at bridging the gap between theory and practice, has restructured its approach to student assessment to capture the distinct nature of theory, practice and mediation in its summative assessment. This has now been adopted by the core course in Organisational and Social Psychology at the LSE for 2020/21 (See Appendix E). Henceforth all students will need to consider the implications of active recontextualisation as they seek to bridge the gap between theory and practice. In August 2020 I was appointed the Visiting Professor in Practice at the LSE. The aim of this position, beyond the individual teaching role is to provide a broader platform for recontextualisation across the Department's activities.

8.1.1.7.   *Publication*

In 2018, along with Faculty colleagues Pam Burnard, Tatjana Dragovic and Rebecca Heaton, I contributed to a chapter in "Methodologies for Practice Research' which outlined the role of creative forms of visualisation in the Viva process (Burnard et al., 2018). I have also produced 3 posters for the University of Cambridge EdD conference related to this study.

8.1.2.   Contribution to use

Contribution to use at Forum has been a defining feature of this study – key aspects of this have already been covered in the account to date and are also captured in the evaluation of the tool. Two additional forms of contribution are worth noting however. The first relates to the achievement of third party industry validation for the Tool and the second, the plans for wider industry application.

8.1.2.1. Industry validation

The results of the Brandon Hall Excellence Awards were announced on August 23rd 2019. The study won a gold award, achieving the perfect score of 30/30. The award was noted by the Faculty on its website, as well as more broadly by the University (Figure 8.1).

Bridging the gap between theory and practice in a complex world

Wednesday 2 October

The pursuit of education, learning and research at the highest international levels of excellence is part of our core mission. Yet the application of ideas in a world increasingly defined by distraction is an increasing challenge. A recent industry award for a Cambridge doctoral student addressed this issue.

Faculty of Education EdD student **Barry Rogers** won a gold award for excellence at the 2019 Brandon Hall Group Human Capital Management [HCM] Awards for Excellence ⤢. The award, in the *Best Results of a Learning Program* category, was a joint submission with a leading European multinational company. It is based around Barry's research on developing a visualisation tool for practicing post-program learning commitments in the workplace. The results were highly encouraging in terms of day-to-day impact and evaluation – a significant challenge for both theory and practice in the field. The learning program is part of the company's ongoing strategy to redefine its relationship with wider society in an increasingly challenging and complex world.

Figure 8-1 Award announcement on the Faculty of Education website

8.1.2.2. Industry application

The on-going findings from the study are linked to a start-up company (Temporalworld.com) that aims to explore the development and use of the tool and its associated methodology, in a wider practice setting. The front page of the website for Temporal World, and its logo, can be seen in Figure 8.2.
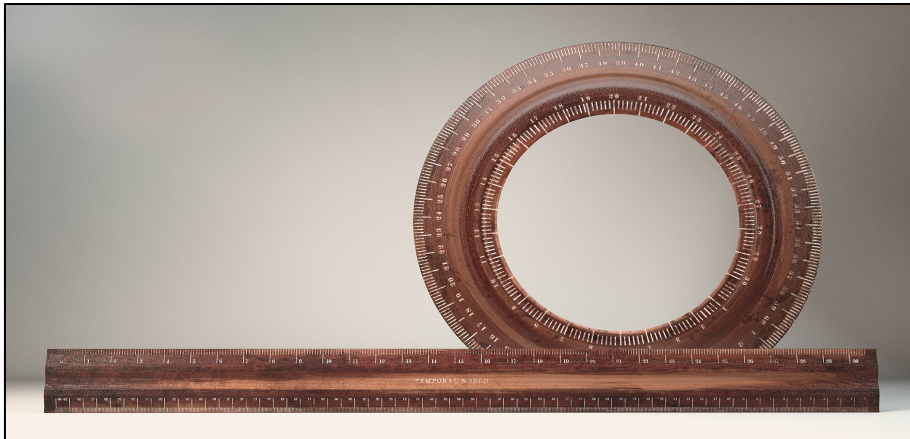
Figure 8-2 Linear and non-linear images and the logo for Temporal World Ltd

8.2. Limitations of the study

I have sought to highlight many of the limitations of this study as they unfolded. Given the nature and extent of some of these however, and their potential impact on the strength of the findings, it is important to address a number of these in greater detail.

As the lead educator on the *Impact* Programme, I had previously worked with each eligible respondent for this study in a close and engaging setting. From the evaluation comments captured at the end of *Impact*, these respondents appeared to have entered the study with high opinions both of me and my abilities. It could be argued that the nature and intensity of this previous association generated a strong possibility of social desirability bias at numerous stages throughout this study

(Bowman & Hill, 2011). This could have led to situations where respondents, consciously or unconsciously were eager to keep me happy via the nature of their responses, as well as their active engagement in the research. Social desirability risks were also linked to the possibility of sponsorship bias (Reutlinger, 2020). While more often associated with clinical research (Jefferson, 2020), sponsorship risk worked its way into the fabric of this study at a number of levels. Respondents were aware of the involvement of elite academic institutions in the study e.g. University of Cambridge, as well as my wider involvement with the LSE. Many of the respondents had a high level of academic attainment and may have had an intellectual connection to the project and the nature of the underlying institutions. This could have had a significant impact on the nature of their responses as they sought to engage with the research in ways that they perceived as 'proper'. Ironically the effect of sponsorship bias could have been further accentuated by on-going attempts by me to distance Forum from the study and by stressing the independent nature of the research.

Sponsorship risk was also relevant in terms of my wider relationship with Forum. As indicated in Chapter Two, this was a close, longstanding connection with the company that had been cemented over many years (10+) and raised a number of obvious questions relating to my independence and objectivity (Fabbri et al., 2018). At a basic level, I had an on-going commercial relationship with Forum where I was employed as a consultant to design and deliver a formal learning programme. This placed me in very different roles, often simultaneously as a consultant and a researcher. To what extent could I realistically separate these roles, and avoid spillover between them (Saidin, 2017). This tied closely to the matter of interests (Atkinson et al., 2000). What sort of implications did my existing commercial relationship with the company have for those that I was ultimately representing during the research? Tied to this, who was the ultimate beneficiary of the research – Forum or the respondents? Any mitigating initiatives put in place to address these risks could only ever operate at a conscious level – how might deeper connections to my relationship with Forum have a potential impact on the research process? This is an issue that goes to the heart of attempting any meaningful organisational research (Davis, 2015), and any form of

researcher, be they an insider, semi-insider or outsider (Fleming, 2018). That said, it was an issue that was particularly relevant for me in this setting and circumstance.

Untangling issues between the use and the users of the tool also need to be considered. Elements of researcher and confounding bias (Galdas, 2017) were never far from the surface over the course of the study. To what extent was I an intimate part of how the tool was used with respondents and what sort of impact did this have on the results? Ultimately, were these results the product of the tool, of my presence or some combination of both? How were these factors potentially interacting with other risks – did the use of the tool over an extended period increase elements of social desirability risk? At the same time how did my relationship with the tool effect the way I interacted with respondents? This tool was my 'baby', I had a lot vested in it – how might this vesting change the way I, and others, interacted with me? These raised the issue of confirmation bias, especially how confirmation tendencies might manifest themselves over the extended period of process development (Hallihan & Shu, 2013). The issues of confounding and confirmation were also a concern in practice. Forum sponsors were eager to understand how they could distinguish between the impact of the tool and the impact of me as the tool facilitator. This was important to them as they had a desire to replicate the process across their businesses and wanted assurances that others would get similar results. Consideration of each of these risks would suggest that the tool should be employed in a neutral setting without either its underlying academic or researcher associations.

The core data gathering for the study was based on interviews that, in most cases, were self-reports. This meant that responses and evaluation were open to same and single source method bias (Podsakoff et al., 2012). This was most obvious in the measurement of change at the end of the PPP when 100% reported a change in behaviour – a result that even the most optimistic of observers would rightly challenge. This is further tied to the issue of precision and clarity in research design (Bauer & Gaskell, 2000). Throughout the study there had been the need to balance exacting definitional precision with the realities of research in a fast-moving, and often ambiguous practice context. From the working definitions of the temporal

dimensions (e.g. what is an interruption?) to the understanding of terms in the evaluation (e.g. what is a change in behaviour?) there was a need for greater operational specificity existing alongside the tension of operational effectiveness. These are areas in need of further attention.

One of the biggest limitations of this research however came from what I did <u>not</u> see as a researcher. The headline account of the study is a story that has been told through a particular and inherently partial lens (Berger, 2008). What else could have been happening in the findings and analysis? What was the story that remained untold because of the frame I employed? This was a live issue for the study right to the very end and one that I will address further in the concluding section.

I attempted to offset many of the above issues by employing a range of mitigations over the course of the study. The research agreement for the study specifically addressed matters of ethics and risk in a pragmatic and dynamic fashion. No consideration was received from Forum at any stage relating to any aspect of the study while all costs associated with the study were covered from my own resources. Throughout, Forum sponsors maintained an arms length distance and had no involvement, interaction or engagement with respondents (except to validate results or in matters of respondent safety). Most of all, an engrained process of reflection and reflexivity was built into the fabric of the design to enhance sensitivity to differing perspectives, interests and accounts. At the same time the triangulation, sequencing and efficacy of different methods and approaches sought to address on-going issues of reliability, validity and credibility in data gathering and analysis. Ultimately the iterative and cyclical nature of the research process hoped to refine approaches in the face of on-going learning and changing requirements.

Finally, this study would suggest that close-to-practices research, however worthwhile, is not for the faint hearted. The challenges of access throughout the study (formal and informal, initial and on-going, physical and technological) posed wider questions about the possibility and practicality of doing any form of meaningful organisational research. As organisations become more bounded (Dick et al., 2017) it

makes the desire to be close-to-practices increasingly difficult. This also challenges the way organisational research is carried out. How is the researcher to bridge the ontological divide between theory and practice if they are not credible in some way in the swamp? This, I would suggest, makes many of the issues highlighted above less clear-cut than they often appear in the literature. It also leads to a dynamism around ethics and risk that goes beyond one-off mitigations, opening a potentially negotiated space for differing interests and perspectives that needs to be constantly monitored.

8.3.   **Integrating comments:** pulling the threads together

The findings from this research unfolded over time and these findings have been discussed independently as they emerged. There is a need therefore to pull the various threads together and see what the overall picture presented by the research looks like. In particular, in line with the core process methodology, there is a need to see how the progression of understanding contributed, if at all, to this overall picture. As a first step, it is worth reminding ourselves of the three overriding research questions that lay behind the study.

[1] What is the role of time in practising change commitments (for members of a commercial deal-making community) <u>after</u> an executive education programme?

[2] How can this community, and other interested parties, help in the development of a post formal-learning intervention (a temporal visualization tool) to facilitate the practising of commitments?

[3] What is the impact, if any, of this tool? What are the wider implications of the research from a programme design perspective as well as personal development?

8.3.1.   The role of time

This study started with a hunch. A hunch that something happened to well-intentioned change commitments after formal learning programmes at Forum, and that this was in some way related to the temporal context participants returned to after the *Impact* Programme. Alongside this, there did not seem to be a language to discuss or articulate the problem within my field of practice. I had a belief that the existing way of thinking and talking about programme learning contributed in some way to negating the presence and effect of the post-programme context.

The headline findings from the research seem to support this initial hunch – that time, in its multi-dimensional form, plays a role in the practising of change commitments. When thinking about, talking about or operating in the post-programme context, the findings suggested that time is more than an un-differentiated linear concept. It has rich, non-linear dimensions that appear to enable, or more likely constrain, the capacity to practise. Furthermore, depending on the particular context, some dimensions of time are more powerful and salient than others. Under these circumstances time becomes an active ingredient in putting knowledge to work as we operate both over and in time.

While this is a summary of where we stand at the end of this study, these comments still have somewhat of a general and abstract quality to them. Digging deeper, if time was the central plot line in the story of this research then the leading sub-plot went to the role of interruptions. The unfolding process of understanding, surrounding the nature of interruptions and their impact, gave insight into the complexity and richness of the role of time. It is worth briefly plotting that process.

8.3.2.   The sub-plot of interruptions

In Paper II the Tool Design interviews provided the first evidence that interruptions were a potent *individual* force. As a temporal dimension they resonated strongly with respondents and clearly had 'energy' for the community at Forum. At this stage of understanding, interruptions were still a singular and largely undifferentiated

dimension - one interruption was very much like the other. In Figure 8-3 below a lone interruption is represented at the top right-hand corner of the page as neutral and bland.

It soon became clear that interruptions were varied in nature. They were different in type, character and effect. What were described as longer-term 'disruptions' (e.g. a holiday, business trip or learning programme) sat alongside virtual interruptions on-line and traditional, physical interruptions like the tap on the shoulder or an unannounced visit at the workstation. The understanding of interruptions now moved from an undifferentiated, individual concept to something multiple that wove into the lives of respondents across and beyond the working day. This can be seen on level II of Figure 8-3 as the single interruption splits into three interruptions, these have more character than level 1 and are represented by different colours.

Different types of interruptions did not act alone however. They interacted with, and acted on, one another and as they operated in combination it appeared also that their potency increased; they became more powerful in terms of their impact on practising. This could be seen in the way a disruption (e.g. a business trip) increased the cumulative number of emails for a respondent or how instant messaging was used as a precursor to an unannounced physical visit to the respondent's desk.   This combination effect did not happen in a vacuum – it gained further momentum by connecting with other aspects of the respondent's working life. Given the nature of their mid-career roles, respondents tended to travel more to see clients yet they combined this with increasing management responsibilities in the office. This resulted in multiple interruptions from direct reports on their return, something they could not avoid given the physical (and virtual) layout of the office space. In a strange way the interruptive gaze was somewhat similar to Foucault's panopticon (Foucault, 1991; McMullan, 2015). This is captured in level III and IV of Figure 8-3, as the combination effect of an interruption connects with the other elements of the respondent's life represented by smaller grey bubbles.

Arguably the issue of transparency has become a bigger, and more nuanced issue for knowledge workers during COVID19 as employers increasingly use technological surveillance to monitor workers on-line (Blackman, 2020). There are initial indications that this has led to rising levels of stress and anxiety (Harwell, 2020) as workers internalise the always-on logic of the technological gaze (Foucault, 1991).

A line could now be drawn under level IV of Figure 8-3. This represents the level of understanding of interruptions at the end of the Tool Pilot interviews. The nature of understanding at this stage might be described as a materialistic, physical understanding of their role. The evidence from the initial Tool Design, Pilot and mini interviews had made multiple dimensions of time more visible. An appreciation of the combined impact of these dimensions on the respondent displayed how their presence could *crowd-out* well-intentioned commitments to practise after a formal learning programme like *Impact*. This understanding was primarily related to the physical volume of interruptions that distracted the respondent in some way and appeared to support my original hunch about the contextual role of time in practising. In one sense this research could have ended at that point.
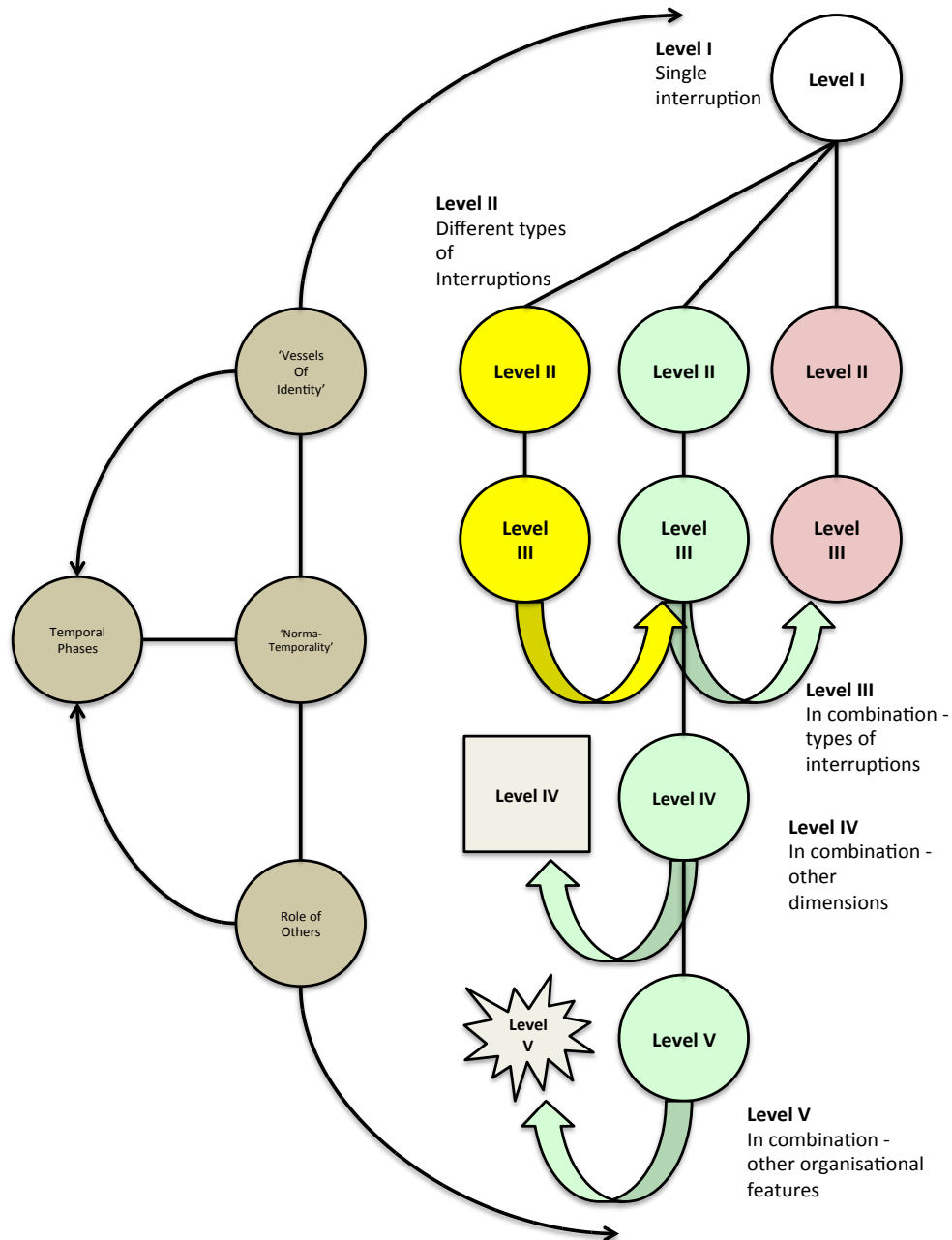
Figure 8-3 The five cascading levels of interruptions

But there were threads in the initial analysis that suggested that interruptions might be more complex. The mini interviews hinted at a differential periodicity associated with the experience of the post-programme context, something that appeared to have a meaningful impact on the immediate satisfaction with practising. Furthermore, there were intriguing references to what was considered normal, proper or legitimate uses of time throughout these early interviews. What was driving

these references? And how were they related to the role others might play in the so-called legitimate use of time.

Level V of Figure 8-3 represents the findings from the PPP stage of the study. Four themes emerged that further refined the picture of temporality, painting a somewhat normative picture in the post-programme context. This context appeared to be inherently periodic with distinct stages that extended beyond the initial experience of 'shock' after a programme. Although these stages appeared to have their own temporal characteristics, they also had a relative impact on one another as they unfolded. While it was clear from the initial analysis that respondents did not practise on a blank sheet (e.g. existing temporal practices crowded out the capacity to practise), it was now clear that there was an additional layer to the practices – they were not value-free. A respondent's existing temporal practices acted like vessels of identity that said something about who the person was. These vessels had temporal significance. They were shaded with deeply engrained norma-temporal characteristics that signalled what was a proper and right use of time for that individual. Furthermore, this was not just an individual phenomenon – this understanding was social. It was shared by others who reinforced and reproduced the current role of the individual through the interactional expectations of their interruptions.   As with previous levels of understanding these emerging themes had their own individual significance but also acted together in combination, potentially adding to the impact of the temporal effect.

Level V understanding exposed the symbolic and normative qualities of temporal contradictions. Failure to see this deeper level meant that a respondent could very easily make a change commitment on the *Impact* programme without seeing its dislocation with the 'proper' organisation and structure of their day. This dislocation was most evident in the use of language and the metaphors that framed temporal practices (Lakoff & Johnson, 2003; Oswick et al., 2002). Respondents would often say they needed to 'make time' to practise their commitment but then struggle to keep to that time. The ability, or lack of ability, to practise was not just a matter of the availability of time; even if the time was available, that time seemed be trumped by

what was deemed to be a proper or more meaningful use of time. This suggests that *making* time for practising was not enough. Recognising the deeply normative and symbolic qualities of times meant that new temporal practices needed to move beyond availability to the realm of *experimentation* and *play*. This metaphorical shift appeared to go some way in explaining why formal reflection at work was so difficult for many respondents. It was seen to be illegitimate when compared to the proper use of time in their day-to-day context e.g. delivering on tasks.

This brings us a long way from the traditional understanding of time after a learning programme outlined in Chapter Three. Here I suggested that Transfer is methodologically incapable of seeing this context and therefore presents it (in effect) as an undifferentiated straight line. The cascading picture presented through levels I to V in Figure 8-3 could not be more different to that solitary line.

8.3.3.   A temporal lens of analysis

More generally this way of thinking and talking about the role of interruptions suggests, and supports a temporal lens in the analysis of context. It begins to provide a language, and a set of conceptual tools that allow us to see different contexts in different ways. It also starts to illuminate aspects of work and life that might not normally be visible and hint at routes of explanation as to why change can often be so hard in certain contexts.

In Chapter Two, I outlined how my field of practice tends to privilege a Transfer lens. This would suggest that those operating from within this lens operate with a range of assumptions about the post programme context that are counterproductive in putting knowledge to work. Tied to this belief is the assumption that all moments of time after a programme are the same; that the act of practising for the substantive individual takes place on a blank sheet; that individuals need to 'make' time for practising and are in control of their own time and can be disciplined about on-going reflection. Ultimately there is a belief that time is neutral in all of these factors. The

findings from this research would appear to question these assumptions. The findings also challenged the representation of the individual as autonomous and sovereign. Intentionality and agency would appear to be fragile in these contexts as they sit in the increasingly diminishing space between stimulus and response. This raised a significant issue for me about the appropriate level of analysis for this study, something I will return to below.

As noted in Chapter Four the concept of timescape would appear to be a useful conceptual tool in breaking the hold of the timeline metaphor, and for incorporating dimensions of non-linearity into the process of recontextualisation. Meetings and interruptions were non-linear dimensions that resonated with the respondents in this study - this is something that could have been particularly relevant to Forum. How might a timescape be different for another category of knowledge worker? It is interesting to compare the situation of a deal maker with that of an academic. As an academic takes on greater management responsibilities within a department, this can move them away from the activity that has largely contributed to their current identity and sense of self – their research, writing and publishing. Interruptions may also become relevant for the transitioning academic as meetings take up greater periods of their time and more people, inside and outside the department, believe they have a legitimate right to interrupt them. The academic needs to *play* with their time if they are to incorporate the new aspects of their role that are now important to them. Where they differ from the deal-maker may be in the temporal dimensions they choose to play with, those that they need to incorporate into their new timescape. The need to think, to write and to publish suggests that creating opportunities for temporal <u>flow</u> might be most important for the academic. Playing with the dimensions of use and flow become the critical tension in their emerging timescape and a necessary strategy for recontexualisation.

8.3.4.   The tool: a success <u>and</u> a failure

The story of the Tool in this study is, I would suggest, less straightforward than the story of time. At a headline level the tool was a success, however at other levels I became increasingly convinced, as the study progressed, that there was a fundamental flaw in the tool design. This flaw was related to the conceptualisation of the individual that was employed in the design and a narrow level of analysis and understanding that underpinned this. The role of the tool was also deeply interlinked with the evolving understanding of time and in particular the role that others, including me, played in the reproduction of times.

First let me address how the tool 'worked'. A key aim of the study was to move from the 'what' of understanding to the 'how' of use. In seeking to achieve this the tool worked well from an operational perspective, had definite novelty and appeared to be a practical vehicle for temporal recontextualisation. The dimensions of time, as represented by the tool appeared to resonate with respondents, provoked genuinely meaningful reactions and fostered generative conversations. The tool also provided a platform for a wider understanding of the nature of commitments in the post - programme setting e.g. highlighting the evolving nature of commitments, as they contended with the realities of the post-programme context. Most of all, the tool went a long way towards meeting its evaluation requirements. There were credible successes captured under these jointly determined criteria. Achieving this type of evaluation should not be underestimated. As noted in Chapter Two there are significant limitations, both in theory and in practice, in measuring the effectiveness of formal programme learning. The success criteria were broad based and, in terms of bottom-line contribution to Forums results, were triangulated with respondents' managers and supervisors. They were also validated at a wider industry level.

A key aspect of the research question related the development of the tool to the role of interested parties in the development process. The *Pattern Languages* proved insightful as an analytical approach during this development. In particular they fulfilled the dual requirement of process analysis in providing guidance both in-the-moment and after the fact. They helped to guide design choices on an on-going basis

and underscored the plurality of users and perspectives tied to design after-the - event.

8.3.5.   The shadows of substance and Transfer

I highlighted the powerful shadow of Transfer in my practice setting in Chapter Two and the link between Transfer and substance thinking in Chapter Three. The long shadows of both Transfer and substance were never far away during the study and crept unwittingly into the design of the tool. What did this look like?

During the initial Tool Design interviews, it was clear that I believed I was designing a substantive object (a tool) that could operate on its own merits. An added irony was that I was designing a tool about temporal context without understanding that the tool itself had to operate in that context. Framed in such a way led me to believe that I could have a long, comprehensive telephone interview to capture data for the first use of the tool. This proved unrealistic. The temporal context I was interested in getting respondents to talk about (as part of the tool use) was already operating powerfully <u>before</u> any respondent ever engaged with the tool. In essence the respondent was experiencing the temporal dimensions of the swamp as soon as they left the *Impact* programme, and ahead of any engagement with the tool. This changed the issues that the process surrounding the tool had to address. To be effective the tool process would need to involve *Impact*, the time between *Impact* and the tool use and the use of the tool itself. This limitation was also evident in the use of the *Patterns*. The majority of guidance in the *Patterns* related to the use and engagement with the tool and pre-engagement was largely overlooked. Designing the 'perfect' tool was fine but what was the point of doing this if no one turned up to use it or engage with it? More fundamentally, this seemed to extend the two criteria I had used to define my approach to Process. Alongside the need to be 'in-the-moment' and 'after-the event' there was an extra requirement, capturing time 'before-the-moment'.

The power of substance ontology continued to play a part in the unfolding of the research design. I had originally thought that a well-designed tool would 'speak for itself', and that the logic of the non-linear temporal dimensions would be enough for a respondent to change their temporal practices. Through each of the initial interview phases, some version of 'so what?' appeared in the responses. In hindsight this was an early indication of the temporal shading that hung over many respondents, via the expectations and demands of others. In believing that the individual was time sovereign I had developed too narrow a view of that individual. Once again, this way of thinking had echoes of Transfer and substance. The tool was becoming an individual intervention as opposed to an embodied process - under these circumstances, revealing the temporal dimensions was as much disempowering for these respondents as it was empowering. The interactional expectations of others meant that they were not in complete control of their time. In one sense the tool had moved beyond the introspective/isolated individual of mainstream, Transfer accounts. This was helpful. The tool, and its process, had also moved a step forward by locating the conception of the individual within a representation of their own temporal context – this broadened the conceptualisation of that individual exposing the wider, social self. Again, this appeared to be a step forward. Despite this, and against my stated beliefs in Chapter Five, I had ultimately however employed a relatively limited level of analysis throughout the design of the tool. This level of understanding still had a narrow conception of the individual at its core. It continued to see a relatively autonomous, sovereign and self-reliant individual as opposed to an embodied actor embedded in a wide social context. This approach had consequences. It placed an undue burden on individual respondents in the study to bring about change - it is possible that I had only extended the logic of Transfer from the programme into the work place (e.g. this is your responsibility to change, and by the way, let me show you how difficult this is going to be). Ultimately the design of the tool process did not accommodate the role of others in any meaningful way. This had implications for the nature of the solution that the design sought to deliver. As well as placing an undue burden on the individual respondent I had extended and transferred that burden onto me. This was something I was aware of as I reflected

over the course of the PPP, but at that stage I could not understand what was behind it.

This was also where the developing understanding of time came into play. I had mistakenly come to see change as a solo act yet that solo individual had to continue to operate in the post-programme context with a multitude of interruptions throughout their working day. Crucially these interruptions were more than momentary distractions. In line with Mead's concept of the social self, they represented markers of interactional expectation based around the respondent's current role (Gillespie, 2005). Conceptualising the individual as a solo agent of change meant that this individual had to continue to deal with these interruptions while focusing on their individual commitment. This inevitably led to conflicts and contradictions in the mind of the respondent, something that was too heavy a burden for many to bear. This I suspect ultimately led to a level of dissonance for many respondents with their commitment (Cooper, 2019; Festinger, 1957; Hinojosa et al., 2016). In practice, extending the tool methodology to incorporate a role for others would appear the only way to generate sustainable change.

Once again, this level of understanding appeared to change the way of seeing the issue. Many of the challenges that respondents sought to address were related to threshold concepts surrounding change (Donovan, 2017; J. Meyer et al., 2010). This legitimately threw up issues of identity (Ibarra, 2004, 2015), however this conception of identity was too narrow. Interruptive temporality, social in nature was tied up with the respondent's social identity (Crane & Ruebottom, 2011; Hogg, 2016; Hogg & Terry, 2000). This identity was shared. As a consequence, any sustainable 'solution' to the times 'legitimately' associated with an individual had to be addressed at that wider level, and involved a broader group of significant others (beyond myself and the respondent).
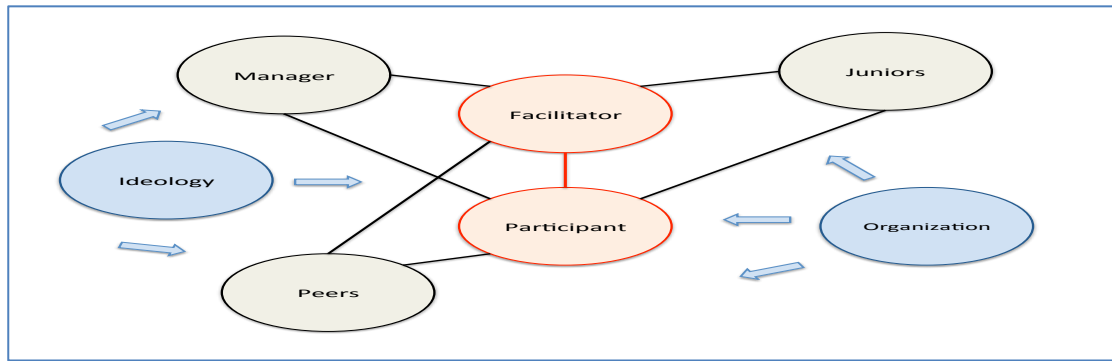
Figure 8-4 Incorporating a wider lens into tool use

This raised a related question for me. How had I allowed this situation to come about? On reflection, I suspect a form of attribution bias had crept into the design of the tool (Robinson, 2017). In the desire to make sure that the embodied individual remained visible and present within the tool process, I had potentially moved too far. I had sought to avoid a situation where the individual became invisible, but in doing so I had over-emphasised that individual and as a result fallen victim to a version of the fundamental attribution error (Ross, 2018).

Expanding my thinking to wider levels of analysis (e.g. organisational and societal norms) made a range of temporal dynamics more visible (Figure 8-4). It also led me to think about the stories that had not been told, or had been overlooked by the research. As I thought more about wider levels of analysis I wondered what else I might see? In doing this I came back over and over to one particular point - the assumptions I had made concerning the equality of time.

8.3.6.   Stories untold

To test this assumption about temporal equality I sought ways of viewing process through a wider lens. Though it may seem an unlikely source, Social Reproduction Theory (SRT) provides just such a perspective (Bhattacharya, 2017; Ferguson, 2019). With its roots in Marxian thinking (Marx, 2011), social reproduction outlines a basis for the existent and continuation of inequality. Time is a core feature of social reproduction, especially in how time is valued and experienced in the hidden aspects

of everyday life such as care-giving (Griffiths, 2020). Through the lens of SRT it is possible to see how certain times, though deemed central to the operation of society are often rendered invisible - as someone who has been a carer (in various forms) for 40 years I can relate to this. More broadly these invisible times are also experienced very differently (Featherstone, 2020). The COIVID pandemic provided a recent example of this. As working from home became the norm for many knowledge workers, this arrangement only intensified the differential childcare burden on women with comparable arrangements to their male partners (Ascher, 2020).

This wider lens on process raised a question for me. What were the times I was seeing (or choosing to see) throughout the study, and the times that were invisible to me? Did I concentrate on those times that I considered to be valued, or that contributed to what is commonly understood as value, to the detriment of others? During the first set of Tool Design interviews, I listened attentively to a 'successful' female respondent talk animatedly, just like her male colleagues, about the impact of meetings and interruptions on her working day. With some passion she also told me about the particular arrangement of her working day around her ultimate responsibility for childcare. For some reason however, while this theme got captured in the coding frame it did not appear as a final construct in my findings. This prompted me to revisit all the interview transcripts and my coding frame, paying particular attention to female respondents. Had I been blind to other such instances? Surprisingly there were only two other cases with similar references to care responsibilities. This seemed low. Was this a result of the questions that were asked or the overall framing of the enquiry? While neither of these explanations can be ruled out, it might also be a case that in some way both sides in the interaction did not consider these times as legitimate or within the scope of the conversation. In SRT terms I, and possibly the respondents, had made an assumption about equality in the relationship with temporality where none existed. It raised another, more worrying question for me. Did the tool, in representing certain times to the exclusion of others, also play a part in producing and reproducing those times? In an attempt to address this, the latest version of the Tool broadens the capture of *less visible* times. While this could be achieved via some form of checklist or questioning route the experience of the Tool

Design interviews suggests that this would be misguided. Instead a simple question on the subjective value of time has proved more useful in highlighting the times that 'matter' to respondents (e.g. 'Thinking about your life as a whole what times really matter to you?'). This is a start in addressing the broader issues with the tool.

8.3.7.   Pluraity and multiplicity

Stepping back from the individual findings of the study, I am struck by the extent to which multiplicity has been a meta-theme of this research. Almost every aspect of this study had a plural or multiple quality. There was not just one story being told throughout but a range of different accounts at a variety of levels. The individual participant or respondent were not the singular focus of understanding but part of a wider cast of characters with differing perspectives. Those perspectives were often framed by a range of ontological and epistemological positions that saw and experienced the world in distinctive ways. This shifted the focus to multiple knowledges; knowledges that needed active translation between settings. It also shifted from an assumption of a single, abstract context to multiple contextual experiences and a view that there is one, linear time to multiple non-linear times and temporal dimensions. This sense of multiplicity also worked its way into the granularity of the process of research. There was not just one literature but multiple literatures as well as different types of analysis and data capture that became relevant over different phases and stages of process. I also wore different hats, was in different roles at different stages and yet sometimes had to wear all simultaneously. Reflecting on the theme of multiplicity I am brought back to the comment I made in Chapter Five about the tension in my methodological character between interpretivist and constructionist tendencies. As the process of understanding has developed, I suspect the latter perspective has become more dominant over the course of the study.

8.3.8.   A role for formal learning

A question I ask myself at the end of this study surrounds the role of formal learning in the workplace? Ultimately, does it have a role at all? As noted in Chapter Three, it is easy to become locked in dualistic thinking surrounding the role of context in learning – either formal learning is acontextual or hyper-contextual. This positioning is not helpful. Ultimately, I suspect I come to rest in a mediating position. Good formal learning recognises the potential and the limitations of its contextual setting. It therefore acts like a spark. It can inspire, create illumination, make things clearer and challenge deeply held assumptions. Most of all it is a testing ground and launch pad for new ideas that have the potential to shape and reshape people's lives and experiences. This is often very difficult to achieve in a non-formal setting. Under the right conditions the spark from the formal setting can become a flame but this requires seeing the contextual constraints of the post-programme setting. The inability to 'see' this contextual impact, especially from a temporal perspective, can mean that the spark created by the formal setting is extinguished. My fear at the moment, and I suspect that this study would tend to support this, is that that flame goes out more times than it survives.

Metaphors play an important part in making sense of life (Lakoff & Johnson, 2003). They also abound in learning and education (Hager & Hodkinson, 2009). It is commonplace to refer to a formal learning programme as an intervention, a metaphorical concept that is laden in temporal significance. It portrays an activity that is finite, discrete, and one-off. Most of all it frames the way we think about the experience of this experience. It is something that is a-contextual, that can be engaged in as a participant or a faculty member relatively unproblematically. Employing a temporal lens changes this framing. Maybe it is better to think of occasions of formal learning as interruptions as opposed to interventions. They are always part of a temporal process, a process where what went before the formal learning and what happens afterwards are relevant and connected. A temporal lens makes this process visible.

8.3.9.   The distinct nature of the EdD

Finally, thinking back to my decision in 2012, I chose this route of enquiry because I believed that the EdD was a qualitatively different doctoral route. Reflecting on that decision now, I have no doubt that the EdD provides a distinct pathway to understanding and use. This, as the study has displayed, is not an easy path - but it is a path that involves more than just a binary choice between rigour or relevance. Pursuing Pasteur's quadrant of use-inspired basic research is the right space for the EdD; one where both rigour and relevance is possible.

As the study progressed I came to the belief that the EdD provides a platform at another level beyond pure understanding and use. There would appear to be an interplay between these two realms – as well as the pursuit of understanding and use this study was also about the understanding of use and the use of understanding. The recognition in 2018 of the need to do something with the findings from the PPP ('understanding') prompted the submission of the award proposal. This was the use of understanding, the active recontexualisation of knowledge to make it fit for a very different setting at Forum, and in the wider industry. At the same time, the evolution of the Tool provided the opportunity for different levels of understanding of how use is achieved when it is close to practices. This would appear to be where the EdD is truly distinctive, in its second order impact on understanding and use.

I started the study with a metaphor from Donald Schön and would like to finish by returning to it. The mountaintop and the swamp have been tropes that have accompanied us throughout this research. Ultimately the EdD would appear to provide an opportunity to pitch a tent half way up Schön's mountain and to ascend and descend with confidence to bring a degree of clarity to the perspectives from each vantage point. As a consequence it is a route that has the capacity to improve the quality of lives through both of these lenses simultaneously. Hopefully this study contributed to that vision in some small way.

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Appendix A : Interview guide for Session I (PPP)

Be **RELAXED, ENJOY** (tear-up script and BE NATURAL)
- Change to Safari
- 5 min before activate no interrupt
- 2 min start recording

Notes to myself ahead of the call
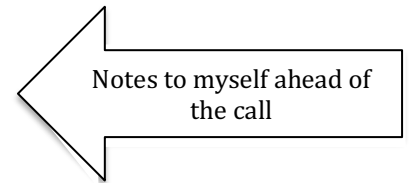
Small talk (NBNBN TONE)

Apologies for **parachuting** into your day I **promise** I wont be more than 25/30 min max. Is that ok?

Description

This is the follow up I mentioned. It is also part of the wider research project that I am doing with the ▮▮▮
- **Annon**, **confidential**, secure no trail
- Would you mind if I record
- **OK?**

Frist off I wonder if you could give me some words to describe what it was like returning to work after ▮▮▮▮▮▮▮
- How did it feel?
- What was the workload like?

Thank you.

AND Thank you for sending me your Commitment. If I was to **summarize** this…

Tool

We talked about making this commitment **practicable and schedulable**. I wanted to see if we could **refine** those elements a bit more.
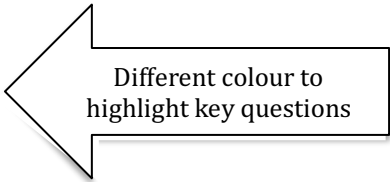
- **SO** I wanted to introduce a **very simple, basic (crude) tool** to put your commitment in context?

Now…to do that can you enable me to share my screen? I have a different set-up [3 step instructions]

Remember (**mantra) Tagline**
- You are what you do
- What you do is how you spend your time
- How you spend your time indicates what you value.
- *I wanted to get a feel for how you spend your time*

Can I ask you a few simple questions? I am interested in what comes to mind so please give a (visceral) best estimate
the call

Different colour to highlight key questions

- When does your working day start and end?

- What percentage of meetings do you have in a working day?

- Can other people at work put a meeting in your diary? (At what level)

- What is the first time (and last time) you check you check your mobile devices for work?

- How many e-mails do you get in a working day?

- How many do you send?

- Excluding emails, how many times might you be interrupted, physically or virtually, in an hour of the working day? [Examples]
  - You are Pinged
  - You check a device unsolicited
  - A tap on the shoulder
  - Someone pops by your desk

- Do you check emails/phones at night, over the weekend?

SO…what does that profile say to you, if anything?

Where does your commitment fit into this type of profile?

Larger text to indicate priority questions
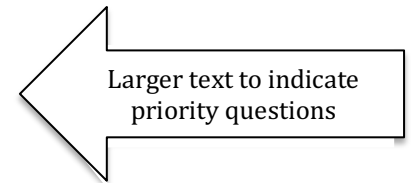
What can you do with that profile to be more disciplined about practising and scheduling your commitment?

- How can you **PLAY** with this
- What can you practically do? **You mentioned…**

Somewhere here are your moments of practice. How do these become as important (VALUED) as anything else there?

- Don't get bumped, forgotten
- How can you be smart about some practices to make these sacrosanct?

HOW do you realistically protect *your FUTURE* TIME – the time you are devoting to your future self? The leader/person you want to be

- What got you here wont get you there?
- If you do what you always did you will get what you always got

Can I leave this image (I will send it) with you and check in in three weeks? (w/b 29th) I will send it to you after the call.
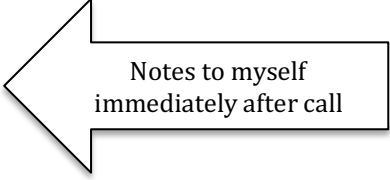
How do you look for the next call? W/B 29th

Can you send me a meeting invite for that?

Appendix B : Transcript for Session I (PPP) [redacted]

███████

- Desire to engage in the process - to give it a try
- Feedback activity on final afternoon
- Blurring boundaries (present to wife)
- ACD resonated
- Number of times he uses *consciously*
- Comments in relation to tool build
- SIMPLE answer prioritization – IF THIS WAS RATIONAL prioritize
- **SCORE you** on the test of time.
- **GOLD DUST Visual management NOT thought time but crucial for SAFETY (bake in)**
- **Just one week in.**
- **BUILDING a wall around certain time periods**
- **What got me here – the POWER of one liners**

Notes to myself immediately after call

R   = Respondent

Barry   = Barry

███   = Redacted portion

Note: 6 minute initial conversation of transition from Impact back to work, including some holiday in Italy and meeting with senior management person on Impact and subsequently back in the office ███

R: It has been hitting the ground running this week, I met up with (Impact participants) ███

Barry: Thank you I promise I will keep it to 15-20 minutes max

R: No problem. I think that this is useful. At least that is my starting going into this…

Description from Barry re consent etc would you mind if I record the conversation…

███████…wait you are not associated with Cambridge Analytics (laughter)

Barry: OK to start, please can you give me some words to describe returning to work?

R: Shall I lie down for this? *Focused* is a word that comes to mind. And *reflective*. And I say this I took it seriously and I think one of the valuable activities that you had us do was the in-team reflection against our statements and I possibly had half a dozen RED additions on top of my sheet ███████

Yellow included in coding
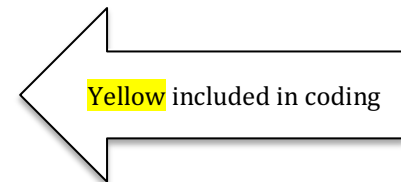
Maybe it was just me but I had to present this to my wife when I came back. She is an introvert and I am an extravert. A colleague said that I should present to her, I was laughing that this was not fun but I posted this thing on the TV in the bedroom, she is 3.5 months pregnant so the whole activity was crazy and she started critiquing me. So I was very focused on this coming out of the session and very committed to overcoming the, how did you put it, the action traction and distraction of this week.

Barry: Can we try and refine this a little further. Put what you want to do in some CONTEXT

R: Yes, that sounds useful

Barry: Remember that tag line we used on Impact – you are what you do etc. I would like to build that out a bit

R: Yes, Ok

Barry: Can you enable me to share your screen?

[**Note**: In setting up the tool there are issues with the technology. Respondent needs to reconnect. Issue with volume on reconnection. All is OK on second reconnection]

Barry: Can I ask you when you start and when you finish your working day?

R: I start at 07:00 to finish 19:00

R: I am checking emails while at home in the morning and close out when I get back home. I don't check after 19:00. Well I don't know. I will look at my phone later (laughter)

Barry: When would your first meeting be?

R: My meetings 07:30 start. I have more of a global role than I had 6 months ago. So I would say that the % of meetings, at least 60% I have to get away from meetings - I *consciously* try to get out of the office and onto site)

R: This is a big issues as I *consciously* fret about about being 'over meetinged'

Barry: First and last check of emails?

R: 06:30 (*consciously* not do before that) and 10:00

R: Wow!!!! I would receive 200 emails a day....

Barry: I think my capacity is 120

R: Ok let's say 120 and maybe 50 sent

Barry: What about the number of interruptions on top of this in any hour?

R: But do you know, for me it is text, and someone coming over to my workstation – this is like the mix of old and new world...I cant believe it....lets go with 30 (that sounds reasonable, **every few minutes I need to ignore something or interact with something.** I don't feel overwhelmed it is just a matter of prioritisation in how I deal with my day

Barry: What does that say to you?

R: OMG! It is a milky way. It is so full!

Barry: Yes, we can be full of the best intentionality but how does this fit with what we do at the moment? Use or lose it. As important and valued as what you do at the moment. How do they fit in? How do you realistically protect?

R: The simple answer is that you need to prioritize things differently. Or said another way not to worry to much about ignoring other things or people...and pray that some of the dots are not EVP's

Barry: To what extent that will stand **the test of time** in this environment? (Pointing to screen profile)

R: Maybe for me it is different. I did a stint in operations before a commercial role and I became very used to brutally forced to prioritize you time and we had an internal consultant who worked in our deep water in Gulf of Mexico group and he preached visual management. I had been coached to block out – essential to block out – time for certain tasks. It was not **<u>thought time</u>**, bake in the ███, site visit. You deliberately carve out time from all these distractions. I don't find this too much of a stretch from a practice that I had drummed into me and I found valuable. There were too many inbound enquiries, if you did not

prioritize you would blow up. That said <mark>I am successful one week in but that is not a data point</mark>.

R: Ummmm...I did view this as a value added, a good shock to the system. I am in the middle of a negotiation right now. <mark>This is a good way for me to deliberately, VISUALLY manage my calendar at points where I think through the stakeholder</mark> assumptions with internal and external stakeholders. Particularly the biases I have brought to my new role from another part of the business esp. dealing with EVPs.

Barry: Discussion by me re deep/shallow time and reference to a number of Forum employees (including his boss). Section has been removed.

R: To have those deep times, that is what I need to do. To move beyond this weekly data point. This is all I have at the moment. I have not heard that but, you know <mark>I get the metaphor and in an organisation like this with so many distractions you need to build a wall around certain time periods</mark>.

R: <mark>Also it was something else you said. In fact, thinking about it, the thing that scares, shocked me was that statement up made around what got you here wont get you there. **Shit! This is going to take some more work**. That really resonated with me. This makes sense to me. This is a big change that I want to do. I will routinely carve time to generate, force myself to generate something but this is difference. This is not just some of the normal tasks.</mark>

R: <mark>Not that I say that, I had this with an engineer yesterday. I found myself just falling back into my old ways. And you know I asked myself. Why did I do that? What did I miss that made me want to know all that detail?</mark> What am I asking...that is dumb. I guess the fear of failing, of not moving forward is good enough impetus for me!
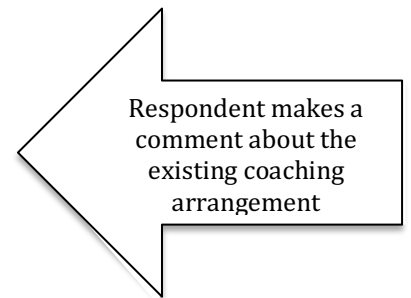
Barry: This distinction is so important...this supports the current model of ███. You need to be ruthless!

R: I am ██████████ in the American sense. You need to fight the urges off and be ruthless. (laughter)
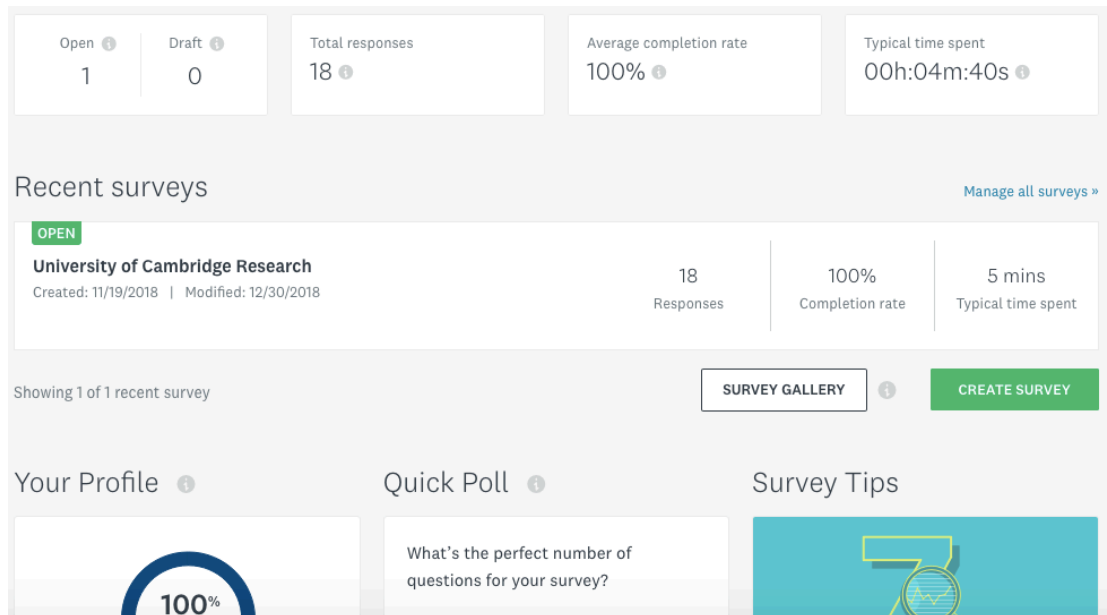
Barry: Can I shamelessly build on your guilt? [Laughter] Can we put some time in in 3-4 weeks?

R: Yes please. Absolutely. I appreciate this. I found this really valuable. I will be coming off running a half marathon…and I will have a good dose of guilt to maintain my focus…

One question ██
██
████████████████████████████

Respondent makes a comment about the existing coaching arrangement

Appendix C : Screenshots from PPP evaluation survey

Open	Draft	Total responses	Average completion rate	Typical time spent
1	0	18	100%	00h:04m:40s

Recent surveys   Manage all surveys »

OPEN
University of Cambridge Research
Created: 11/19/2018 | Modified: 12/30/2018

18 Responses	100% Completion rate	5 mins Typical time spent

Showing 1 of 1 recent survey   SURVEY GALLERY   CREATE SURVEY

Your Profile   **Quick Poll**   **Survey Tips**

What's the perfect number of
questions for your survey?

100%

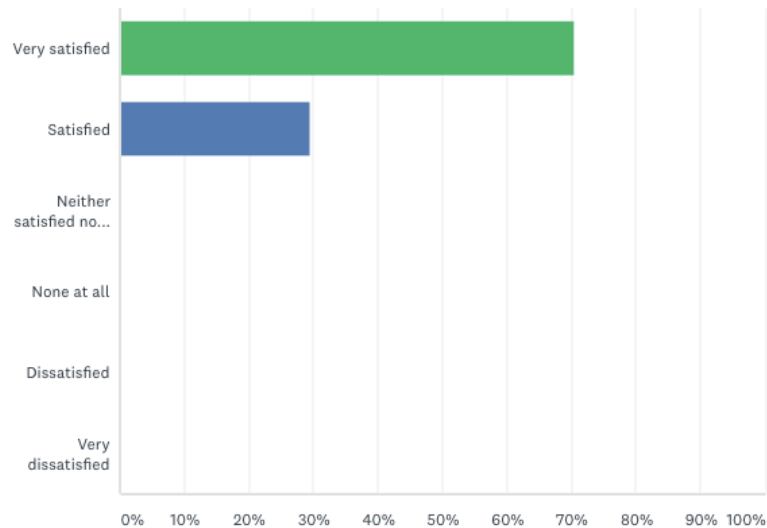**Q1**   Customize   Save

How satisfied have you been with the process of follow-up after [____]
[____]?

Answered: 17   Skipped: 1

ANSWER CHOICES	RESPONSES
▾ Very satisfied	70.59%
▾ Satisfied	29.41%

117

Related to the commitment you made at the end of [_____], has your behaviour changed at all since the program?

Answered: 18   Skipped: 0
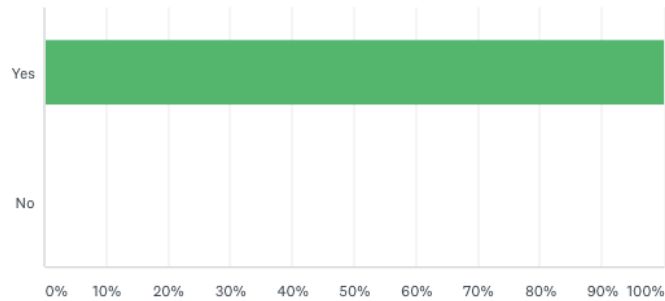
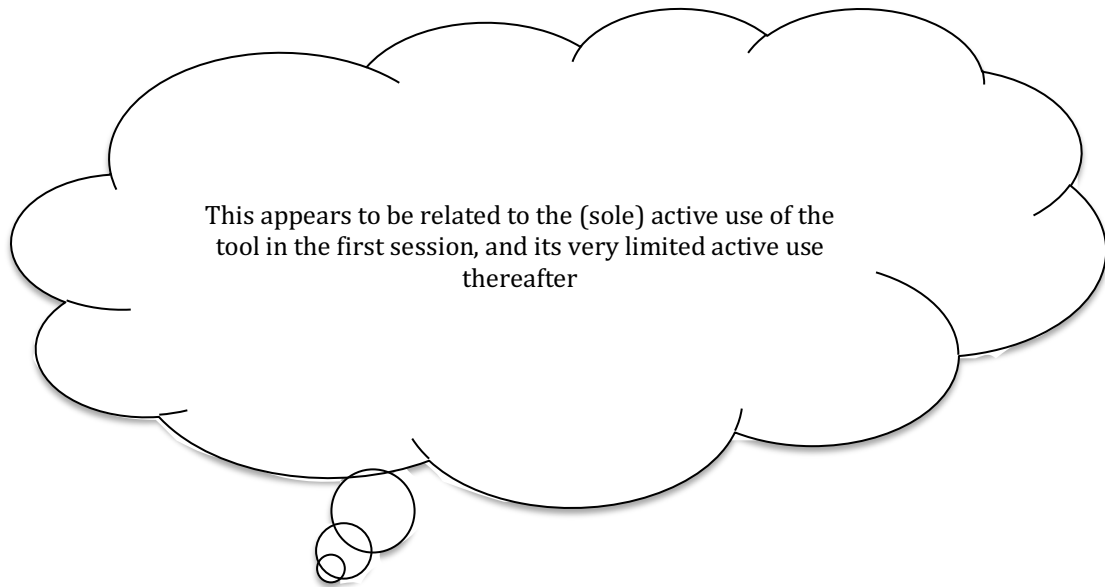| ANSWER CHOICES	RESPONSES	
Yes	100.00%	18
No	0.00%	0
TOTAL		18

If yes, to what extent has this process of follow-up enabled you to practise your behavior change?
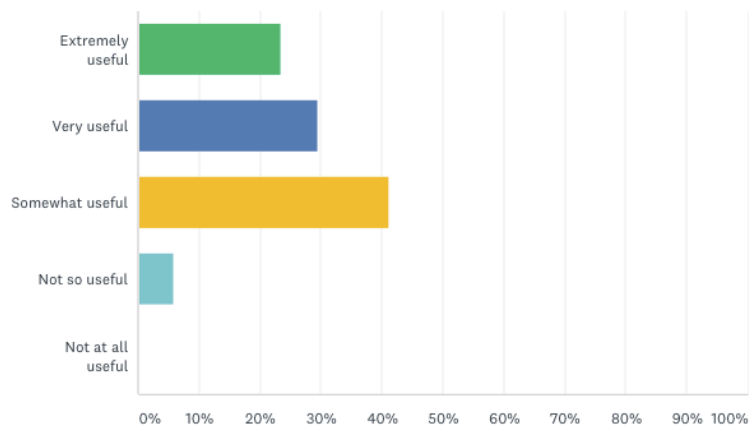
Answered: 18   Skipped: 0
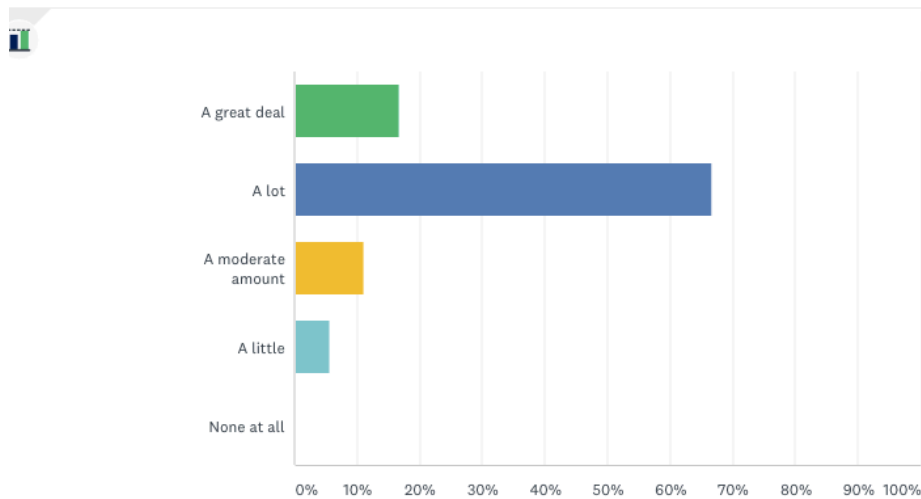
ANSWER CHOICES	RESPONSES	
A great deal	16.67%	3
A lot	66.67%	12

This appears to be related to the (sole) active use of the tool in the first session, and its very limited active use thereafter

How would you rate the usefulness of the visual tool (e.g. the 'diary' visualisation)?

Answered: 17 Skipped: 1

Extremely useful
Very useful
Somewhat useful
Not so useful
Not at all useful

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

How likely is it that you would recommend this process to a friend or colleague?

Answered: 18 Skipped: 0

56
NPS
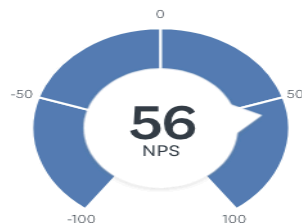
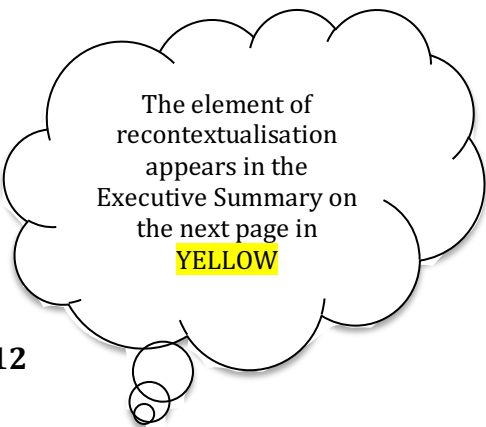| DETRACTORS (0-6)	PASSIVES (7-8)	PROMOTERS (9-10)	NET PROMOTER® SCORE
0	44%	56%	56
0	8	10	

Paper III Interaction of understanding and use

Appendix D : LSE *recontexualisation* assignment

Essay Title

Formative Assignment: A written assignment (maximum 500 words). To be submitted via moodle **by TBD.** This formative assignment will comprise a detailed plan that will later be developed by the student into the essay to be submitted as the summative assignment.

Further information about the format and content of the essay plan will be provided by Barry Rogers in week 7 of Michaelmas term.

Summative Assignment: The summative assessment for PB 402 will reflect the dual nature of the course e,g. connecting the rigour of theory with the relevance of practice. As part of your assignment you will prepare 3 short documents that explore the process of bridging the realms of theory and practice – a case outline, a theoretical document and an executive summary.

The element of recontextualisation appears in the Executive Summary on the next page in YELLOW

The summative assignment is to be submitted via moodle **by 12 noon on TBD.**

Please consider the following as the backdrop/context to your assignment. You are an external consultant that has been asked by a key client to address an issue that is a significant challenge within their organisation. For the purposes of this assignment the issue is related to the central topic you developed in your PB 402 essay in Michaelmas term. This topic will initially be set out by you in your formative submission and developed further in your summative submission. In your role as someone who seeks to bridge theory and practice please keep in mind your underlying motivation throughout the formative and summative process e.g. to deliver insight that connects theoretical rigour with practical relevance.

1) Case outline
Description (Summative, 300 words max)
- Describe/explain an emerging phenomena that has practical significance for your client and is related to your essay in Michaelmas term.
- Reference this phenomena to real-life contemporary issues and examples (e.g. recent newspaper articles)
- Briefly describe the organisation and setting in which you are operating (100 words max)

Intended Learning Objective
- To identify and outline an emerging phenomena of organisational life that has practical significance for the world of work
- To connect the phenomena with issues of contemporary relevance
- To link these issues to the core topics and themes of PB 402

2) Theoretical document
Description (Summative, 600 words)
- Briefly outline the theoretical background to the problem/phenomena you have identified (200 words max)
- Establish the foundations for a potential approach/solution to this phenomena (400 words)

Intended learning objective
- To address the designated phenomena from a rigorous, theoretical perspective
- To appreciate the subtlety and nuance associated with differing theoretical perspectives surrounding the phenomena
- To connect the phenomena with lectures/class discussions on PB 402
- To ground a credible theoretical 'position' in relation to the phenomena

3) Executive summary
Description (Summative, 600 words)
- You now need to present your approach back to the client. Prepare a 'document' - in **any** relevant format – that outlines your suggested approach in a way that is
  o faithful to your theoretical exploration yet
  o *connects* with the 'world' of the client (e.g. focus on practical needs, language, temporal orientation)

Intended learning objective
- To summarize the key features of your potential solution and approach
- To recognise the need for *active* translation between the domains of theory and practice.
- To practice the art of translation and recontextualisation