Learning and knowing – synonymous terms?

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Introduction

What makes management and organizational practice change? And how is it possible to understand these changes through the lens of learning – or as learning? These are some of the questions that we seek to answer in a project on the evolution of management and organizational practice and practising.[1] In this paper we focus on induction practice as an example to illustrate some possible answers to the above questions as well as upon some potential theoretical developments of change viewed as learning – individual and organizational.

We have chosen the headline, "learning and knowing – synonymous terms?", because we want to challenge the understanding of learning as primarily associated with issues of knowledge and knowing. We, however, also want to challenge the counterpart of this understanding of learning, namely learning as a "practical" issue derived from access to and participation in communities of practice. We think that these two understandings of learning are in it together, so to speak, as learning is both about knowledge and knowing and about participation in practice. There are probably not many who would disagree with this position when it is formulated as an either-or, but the issue is how do we get to the both-and understanding of learning without making one or the other the determining element? In this paper we propose a "third" position that we have chosen to call learning as "emerging" or "becoming", which do not privilege one understanding of learning (learning as knowledge acquisition) over the other (learning as participation or practice-based) (see also Clegg *et al.*, 2005; Elkjaer, 2004).

[1] The project is part of an international comparative project, "The Evolution of Practice and Practising – A Comparison across Organisations, Industries and Countries" headed by Professor Elena Antonacopoulou from Liverpool University. The grant number is RES-331-25-0024.

We begin by laying out why and how learning is often associated with knowledge and knowing, and continue with a brief presentation of the counterpart of this position, that learning is about access and participation in organizational practice. We then continue with presenting a third position, learning as emerging – or in John Dewey's words, "learning as growth" (Dewey, 1916 [1980]) in which learning does not begin with either knowledge or participation although both are present, but with an emotionally felt meeting with an uncertain situation that calls for a resolution. This understanding of learning takes the focus away from either the individual and knowledge acquisition or the context and the access and participation patterns, and onto the uncertain situation. The constituents of the situation are individuals, work and everything belonging to this (e.g. knowledge and skills, emotion, artefacts) as well as context(s), but the focal point is the problematic situation.

After this theoretical layout we present our case, which is about induction, and give a brief introduction to the issue of induction. Then we introduce the Danish retail banking industry and the case branches and set the scene for the unit of analysis; a discussion of induction processes in the two case branches.

We end the paper by presenting a dilemma, which to us underlines that to understand change as learning we need this third position as one cannot claim that induction is either about the newcomers' knowledge acquisition or about newcomers' socialization through access to participation in communities of practice. Rather, induction is both about individual and organizational growth from the continuous tensions between the novel represented by the newcomers and the organizational habitual ways of acting.

Three understandings of learning

Educational institutions like schools and universities are organized around knowledge acquisition, and learning is closely connected to teaching. The understanding of learning as connected to teaching and knowledge acquisition has shaped our general understanding of what is means to learn. And this understanding of learning has also until quite recently been the predominant theory of learning at work and in organizations (Hager, 2004). This means that the creation of a learning organization as well as organizational learning is often associated with the question of how to most efficiently disseminate, "manage" and understand organisational knowledge and knowing (see e.g. Easterby-Smith & Lyles, 2003; Gherardi, 2006; Nicolini *et al.*, 2003; Scarbrough & Swan, 2003).

The understanding of learning as the acquisition of knowledge may be understandable when we look at the questions that organizational learning has derived from. Taking a point of departure in the early works by Cyert and March one may see their contribution to the field of organizational learning as answering a question, which could have been formulated like the following: "How to make efficient decisions in organizations when we no longer can rely on rational models because human behaviour tells us something else?" (Cyert & March, 1963). The background was the coining of the concept of "bounded rationality" as an explanation for the impossibilities of the economic model thinking, i.e. humans (read: managers) were simply not able to compute all the information needed to make a decision based upon full information but had to rely on satisfactory information (Simon, 1996 [1991]). Decision-making in organizations came to be viewed as a process that can be improved by individuals' acquisition of relevant information and knowledge, which in turn can guide the organizational behaviour of individuals. Learning became in other words an issue of organizational members' knowledge acquisition.

Later, when Argyris and Schön wrote their seminal book on organizational learning, one can see the question that they were grappling with as the following: "How to avoid defensive reasoning leading to unproductive learning?" (Argyris & Schön, 1978, 1996) . Their understanding of learning takes a point of departure in how humans in organisations communicate, and in their understanding this happens with a point of departure in our theories of action – our mental models. And Argyris and Schön claim on the basis of their research that we all make use of defensive reasoning when we find ourselves in threatening or embarrassing situations. This will inevitable lead to unproductive learning, as it is not based upon a testing of the basic assumptions and attributions that we ascribe to others, and as such take a point of departure in invalidated knowledge and information. So in Argyris and Schön's understanding, the task is to acquire these communicative skills that make it possible for us to enter into non-defensive reasoning and pave the way for productive organizational learning.

Again, we find that learning is about some form of acquisition of knowledge and skills – often with the help of external consultants (e.g. teachers, facilitators, coaches). Organizational learning became a mirror of the kind of learning that is found in educational institutions.

But workplaces and organizations do not exist in order for teaching to take place but to produce goods or deliver services, and learning here is a side-effect of working (Marsick, 1987). Also, in educational institutions the primary focus is upon the individual learners whereas work in organizations should be understood as "coordinated, collective endeavours" making the relationship between the organization, individuals and work a prime focus (Clarke, 1991). This means that to focus on learning in a work setting should include learning as part of the everyday life of an organization – of the organizational practice, and to view learning as a relational endeavour rather than an issue of individual knowledge acquisition.

Before entering this idea of learning it is timely to look at what we earlier have coined as the counterpart of learning as (individual) knowledge acquisition, namely learning as participation in communities of practice – or practice-based learning. A seminal paper within the practice-based understanding of organisational learning is written by Gherardi, Nicoline and Odella, and can be framed as based upon the following question: "What if learning is neither attached to teaching activities nor about individuals but rather about the organisational contexts of unfolding organisational learning – how should we then understand learning?" (Gherardi *et al.*, 1998).[2] In the participation or practice-based understanding of organizational learning, learning is regarded as a part of human activity – learning can, in other

[2] Note that it is us who have formulated these questions in order to create the line of reasoning that we pursue. The questions reflect the way we read the contributions and might not be congruent with the authors' view.

words, not be avoided. Learning is an integrated part of the organizational everyday life and its work practice (for an overview, see Nicolini et al., 2003). This view of organizational learning changed the learning process from taking place in the minds of individuals as acquisition of knowledge and skills to being part of the access and participation patterns of the organizational members. Learning is about the construction of communities of practice and membership and becoming competent practitioners (Brown & Duguid, 1991; Richter, 1998). Learning is a practical, rather than a cognitive process that cannot be separated from the creation of (professional) identity.

Learning as participation brings learning into the social world of organizing and organization; organizational learning becomes a social activity. It is, however, not possible to see how learning comes about through participation. Also, the concept of knowledge (the learning content) as deriving from practice makes it difficult to understand how it is possible to include thinking or reasoning in order to conduct theoretically informed actions. In the following, we show that it is possible to expand this understanding of learning to include a concept of knowledge that includes acting and thinking, as well as body, emotion and intuition. This is to acknowledge that learning is also about skills and knowledge acquisition whilst happening through participation. The development of a “third” position of organizational learning is done by way of John Dewey’s pragmatic understanding of learning and a pragmatic theory of organizations understood as arenas consisting of social worlds held together by commitments (both necessities and wishes, have to and want to) to action and interaction around work and organizational life (Strauss, 1978; Strauss, 1993).

Learning as emerging or as growth is an understanding inspired by pragmatism. In the Deweyan universe, there are no universal cognitive structures that shape human experience of reality. Also, knowledge – or in Dewey's own words: "warranted assertibilities" – always refer directly to human experience and the origin of knowledge is the lived and living experience. This does, however, not mean that pragmatism rejects cognition as "(…) thinking is a process of inquiry, of looking into things, of investigating. *Ac*quiring is always secondary, and instrumental to the act of *in*quiry. It is seeking, a quest, for something that is not at hand" (Dewey, 1916 [1980]: 148).

In pragmatism, different forms of thinking and abstraction, such as ideas, theories, and concepts, function as instruments for actions. Not by way of an innate mental model, but as tools for defining and solving specific problematic situations. Dewey's development of logic as a theory of inquiry takes its point of departure in experiences as inquiry is anchored in everyday life.[3] It is part of life to inquire, turn things around intellectually, come to conclusions and make evaluations. This is how people learn and become cognizant human beings.

Inquiry is a process that starts with an emtionally sense that something is wrong. But when the problem gets defined, inquiry moves into an intellectual field of reasoning

[3] It is important to note that the pragmatic term "experience" is not the same as our everyday understanding of the term. Experience is both the process of becoming experienced as well as the outcome of experiencing. Experience is not to be equivalated with the past as it is oriented towards the future, to anticipating what is coming. Also, experience is not just what comes out of doings, of practising but is also informed by reasoning (Dewey, 1917 [1980]).

and thinking. In other words, inquirer(s) use their previous experiences from similar situations to define the felt uncertainty. According to Dewey, the inquirer(s) try to solve the problem by applying different working hypotheses and conclude by testing a model of solution. The initial feeling of uncertainty that started the inquiry process must disappear before a problem has been solved. If the inquiry is to lead to new experiences, to learning, it requires thinking or reflection over the relation between the problem's definition and its solution. Not all inquiry results in learning in the sense that one can verbally reproduce an outcome. Dewey emphasises the aesthetics of experiences and the sensation that they perfect or complete, and any delight and comfort in a situation is also an experience – and knowing is just one way of experiencing (McDermott, 1973 [1981]). This latter is important because this is at the crux of our questenioning learning and knowing as synonymous terms. We find that we need a term like "experience" to be able to include the learning that is not knowing but not by denigrating experience and refer it to something before knowing but as a term to label the process of humans at work with their environment and for which knowledge may or may not occur in the sense that it can be shared verbally.

In sum, pragmatism is a reminder of human agency but this agency is grounded in and part of context, work as well as individual capacities. Reasoning is useful as it can act as guidelines for actions by way of working hypotheses, and reflection is necessary in order to produce learning. The organizational member and the organization are weaved together in social worlds in which acting and thinking goes on as a continuous process. It is not possible to separate the individual and the social, the context and/or the organization in pragmatism. The two are mutually constituted as human beings and human knowing, and as such they are products and producers of history and culture. This is why we propose a situation – or "a practice" as the unit of anaysis and it it to this practice we now turn our attention.

Induction

We use induction as a unit of analysis and several processes in play in induction may be labelled learning, development, change and/or knowing. A closer look at the theoretical base on which these processes rest will provide clarity of the different aspects of the induction process, and will provide us with a starting point for further theoretical development.

John Wanous divides induction into 2 phases: pre-entry and post-entry. Pre-entry can again be divided into selection and recruitment, and post-entry can be divided into "orientation" and "socialisation" (Wanous, 1992). Wanous emphasises the importance of splitting the post-entry phase up into two separate processes, because there are major differences in the content and purpose of the two. The aim of orientation is to help newcomers cope with entry stress experienced upon entering an organisation. Orientation refers to specific programmes aimed at providing competence on a preliminary level in order to start working. As a result of this, Wanous claims, orientation is planned for a short termed period, and the people involved are not necessarily part of the newcomer's work team, peer group or management. HR professionals, trainers, external consultants are all in principal capable of providing sufficient information to newcomers. In addition, introduction courses, videos, handbooks, e-learning programs etc. are widely used to orient the newcomers towards the organisation. Learning is about acquiring specific skills and knowledge.

In contrast to this, socialisation is seen as a long term process, involving a totality of the surrounding colleagues, the organisation, the informal structures and implicit knowledge in practice. Socialisation processes do not contain specific programs and are not goal directed, but requires participation in the work practices in order to adjust to the norms and values, as well as to the routines of the organisation (Wanous, 1992). Learning is primarily concerned with reproducing things as they are, albeit reproduction is not just a matter of repetition, as organisational routines hold a potential for change (see e.g. Feldman, 2000).

In their seminal paper, van Maanen and Schein (1979) describe organisational socialisation as a reproductive and necessary process in order to not disturb the ongoing activity and the established organisational routines. Socialisation processes results, according to van Maanen and Schein, in certain responses by the individual; a custodial response, a role innovation or an innovative response, which depend on the tactics selected by the management. So, socialisation can in other words also lead to innovative learning but this is dependent upon the management practices on induction. Linking this view to induction, organisational socialisation is the process by which the newcomer "…acquires the social knowledge and skills necessary to assume an organizational role." (Van Maanen & Schein, 1979) either by training, education, self-guided learning processes or apprenticeships.

What is not touched upon by either Wanous or Van Maanen and Schein is that socialisation processes are also about identity building and identity transformation, through what Lave and Wenger (Lave & Wenger, 1991) call "legitimate peripheral participation in communities of practice", which is described by Wenger as: "… the process by which newcomers becomes included in a community of practice" (Wenger, 1998). Lave's research on tailor apprentices in Liberia describes how becoming a tailor encompasses much more than learning to sew (knowledge acquisition) and learning to reproduce social structures among the masters (participation). The apprentices also learn to make a life, to make a living, to grow up and to mature in order to become accepted and respected as masters of their trade (Lave, 1997). Identity formation is, accordingly, a very important aspect of the socialisation process that takes place in induction (see also Clegg et al., 2005). Again, are we not just repeating the notion of learning as already coined by Lave and Wenger – and in organisation studies by Brown and Duguid (Brown & Duguid, 1991) and Gherardi, Nicolini and Odella (Gherardi et al., 1998)? And in one sense this is so as practice-based learning share the ontology with pragmatism but pragmatism adds an understanding of what triggers learning (the uncertain situation) as well as what produces community or sociality at work (commitment to actions, activities and values). This makes it possible to see learning as both as issue in which reasoning is a part and of production of identities as also a matter of agency or commitment. In other words, pragmatism may help open up the black boxes that a practice-based understanding of learning creates.

Introduction to a case study

The case study company is the largest Danish retail bank, Danske Bank, with more than 3.5 million customers in Denmark, Norway, Sweden, Northern Ireland and Ireland. Danske Bank has almost 300 branches nationally and several corporate banking centres. Danske Bank Group employs more than 19.000 employees internationally. It was founded in 1871. During the 1980’es the financial market was liberalised and the sector experienced cross-sectional development. This led to the emergence of so-called “financial supermarkets” where customers could “shop” for a range of different financial products in the same company. In 1990 Danske Bank merged with two other Danish banks in what was the largest merger in Danish history (Hansen & Mørch, 1997). The purpose was to gain major competitive advantages, which was obtained primarily by a fast and successful technological integration of the three banks’ IT-systems. In 1995 also insurance companies were incorporated in the corporation. The position as a major player on the financial market, not only in Denmark, but also in the Scandinavia and Northern Europe, was cemented in 2001 where Danske Bank merged with yet two Danish financial institutions, a bank and a mortgage-credit institute as well as two banks in Ireland and Northern Ireland in 2005. Danske Bank now offers a wide range of financial services and products: insurance, mortgage finance, asset management, real estate and brokerage.

Since the early 1990’es the bank sector has experienced major changes. The changes are traced from two interrelated pressures, external pressures such as increased competition, and internal pressures, such as changed organisational structures and bad debts provisions (Andersen, 1996; Finansrådet, 2005). There were signs of a national financial crisis in the early 1990’es. Several of the leading financial institutions did not generate surplus, bad results were not just temporary, the confidence in the sector decreased, and several banks went bankruptcy (Pedersen & Aagaard, 2005). From January 1991 new legislation made it possible for banks to run insurance and mortgage finance. One of the consequences of the crisis and of the legislative measures was “trade gliding”, which is described as the emergence of cross-sectional corporations as a result of poor economic performance (Andersen, 1996). Today bank employees therefore must perform tasks that traditionally were placed in other financial institutions, such as insurance sales, pension schemes and real estate. Another sign of trade gliding in the early 1990’es was a series of mergers, leaving the Danish banking sector with a few major retail banks with 5 banks counting for more than 84% of the total banking assets in Denmark (Finansrådet, 2005). The mergers have resulted in a decrease in the need for employees, as running costs in core service functions and the net of local branches have decreased.

Also an increase in competition has sketched out the development in the last decade. New and specialized “discount banks” have emerged, internet banking is increasing, and foreign banks are entering the Danish market. Today foreign banks are estimated to have a share of the market of about 10%, and they are foreseen to play an increasing role in the future (Andersen, 1996; Finansrådet, 2005). Combined with a growing ability and tendency amongst customers to compare prices and chose between different products, focus is now laid on the personal relationship and the experience of personal service (Pedersen & Aagaard, 2005).

Setting the scene for the unit of analysis

Studies were carried out in two branches of the same Danish retail bank, both situated in the Northern part of Zealand. Branch number 1 (DB1) is situated in a small town with about 20.000 inhabitants. It services both private customers and businesses and its services range from ordinary loans to pensions schemes and real estate. The branch has app. 22 employees. The bank manager is also managing 5 other smaller branches in the neighbouring towns. The other branch (DB2) has app. 30 employees, has the same range of services and the manager is responsible for 3 other branches. It is located in a medium sized town with a little more than 60.000 inhabitants.

The branches have within the last years experienced changing recruitment patterns and have begun to look “externally” for employees. This is a fairly new practice, as the bank sector has a strong tradition for only employing people with a financial background primarily from within the corporation, or has recruited apprentices with a mercantile upper secondary education to follow a structured financial training.

The technological development has created some serious challenges to both branches. One is the loss of customers. As home-banking and solely internet based banking is increasing, the branches experience a decrease in the number of face to face transactions. Another related consequence is the struggle to keep the customers in the branch. There is a fierce competition on interest rates, products and services, and both branches operate in cities where several banks are present. Thirdly Danske Bank struggles with a conservative, elitist and exclusive image (Hansen & Mørch, 1997), which presumably makes it difficult to attract new customers, especially the younger ones. Finally Danske Bank is the largest bank in Denmark, leaving the corporation exposed in the Danish media and vulnerable to bad PR. However, the bank is very aware of its prominent status in the Danish society, and also of the obligations that follows.

These factors have led to the need to rethink recruitment and induction policies. In order to obtain a more customer oriented approach, the branch management seeks to employ personnel with a more service minded approach to certain functions in the bank, which is reflected in two recruitment strategies carried out in the bank. One strategy is to recruit people with different and alternative backgrounds in order to have a diverse selection of staff that is able to relate to all types of customers. This is exclusively handled by the branch itself. Another is to recruit younger people with an outgoing profile in order to change the image and attract younger customers. When it comes to selecting apprentices, the process is more centralised. The regional office is responsible for selecting and recruiting a sufficient amount of apprentices to cover the need in all the branches in the region. The apprentices are normally selected at large assessment days, where up to 350 candidates are invited. The few selected candidates then receives an apprenticeship in one of the larger branches in the area. The branches thus still trains new employees through apprenticeships, but a growing number of employees are recruited with no prior bank experience. It is no longer seen as necessary for employees to have a financial background when working at the teller, taking in or out smaller deposits, or working at the front desk helping with more complex issues such as opening new accounts, looking through budgets, booking meetings with the financial advisor, or tracking transactions. The purpose is to employ staff that is able to talk to all kinds of people and can create a personal relation to the customer. Therefore the branches have widened the selection pool to include people working in the service sector, and hope it will give a potential lift towards a more service minded staff.

Induction in the case branches

In the two case branches two types of newcomers were identified: apprentices and “externally” recruited employees. In the following, induction practice of the two types of employees is analysed without taking into account the different job functions that the newcomers carry out. Our point of departure is guided by the following working definition of induction: The practice and practising exerted upon a newcomer’s entry in an organization (see also Antonacopoulou, 2006).

The analysis is based on semi structured interviews with 11 people. To get perspectives on induction from all levels, we have interviewed 3 branch managers (IP-BM), 4 older colleagues (IP-CO) and 4 newcomers (IP-NC) (3 “externally recruited” and 1 apprentice). The interpretation of the data has been by reading the interview texts to find out what makes induction practice change and whether these changes can be understood as learning, i.e. a thematic or theoretical text interpretation has been applied (Kvale, 1996).

The apprenticeship is part of a formal education and both branches have considerable experience in inducting newcomers with this particular role. The apprentices are usually younger people in their late teens or early 20’es, with a mercantile upper secondary education. The “Financial Training” is a two-year standardised basic training with the aim of teaching the financial standard products in order to make the apprentice capable of providing adequate advice to ordinary customers. It is very well structured and run according to specified regulations with a governing body, controlling the training of bankers. The financial training contains between 40 and 50 hours in school, where the apprentice has obligatory as well as optional subjects ("Www.Finansuddannelser.Dk/login/login.Asp"). The apprentice has a tutor or mentor appointed from the branch, who is responsible for the entire process. Both the apprentice and the mentor can follow his or her program and progress on the internet.

The externally recruited employees come from very diverse backgrounds. One is originally educated in a bank, but has prior to re-employment in one of the case branches been working as chief financial officer in an insurance company for 15 years. Another newcomer was prior to employment a travel guide, and yet another comes from a position as sales manager in a clothing company.

The two branches have a tradition of welcoming new employees with a social gathering where the branch provides breakfast and the manager give a short welcoming speech. However, from that moment, the two types of employees' induction processes take separate directions. The apprentice enters a formal and structured program with a mentor who has designated time in his or her schedule to coach and help the apprentice. The externally recruited newcomers follow an ill-structured process characterised by its arbitrary nature and no extra designated time, which is expressed by the following interview persons (IP's). The first quote is by the branch manager responsible for recruiting and selecting new employees. The second quote is given by a colleague, with no formal induction responsibility. However he plays a significant role as he implicitly is expected to introduce newcomers to IT systems and internal procedures in the bank. The third quote is a brief description of the first day given by an externally recruited newcomer.

> IN: The people involved, do they have designated time
> to take care of the newcomers?

IP-BM 2: No, I must say, there isn't. And in pressed situations, which we always have (…) then you don't have the time to coach, because we also have the customers to take care of. (…) And we must admit; no there isn't.

IN: Not for apprentices either?

IP-BM 2: Yes, for apprentices, because we have the supervisor, and it is my assistant XX, that has designated time during his day to coach YY. (…) We are more used to have an apprentice in the house.

(Branch Manager, DB2)

IP-CO 1: No one has the time to spend with an apprentice that is needed. That is my opinion

IN: And you didn't feel that you did, either?

IP-CO 1: No, I didn't. In the 8 days I sat with her [the newcomer], I had to do the rest in overtime.

(Colleague, DB2)

IP-NC 3: Immediately the first day, I was sat on my chair and then worked from there. And then I naturally could ask and seek help from my colleagues, but it becomes a little limited as you can see that they are busy. It becomes, I think, a little problematic to move on, because you don't know the systems, and because they are very complex, then you have quite a problem as a total newcomer.

(Newcomer, DB1)

Only one of newcomers experience to have a person assigned specifically to help her out for a period of time, but they have all felt that they could easily ask colleagues for help on practical matters and minor problems with computer access, tasks or procedures. However, they have sometimes felt hesitant to do so, as they are aware of the work load of their colleagues. This is confirmed by the colleagues and managers who do not hesitate to help, but as the above quotations shows, do not have designated time in order to do so. No special instructions or specific preparations are given to the colleagues in order to take care of a newcomer and introduce him or her to the job, the routines and the organisation.

Despite the fact that the three externally recruited newcomers have different expectations and demands to an induction program, they all report an absence of induction procedures. Following Wanous, there has been no orientation to minimize post-entry stress. The newcomers have had no clear vision of what was expected from them, of how the adequate knowledge could be obtained, or when it was expected to be learned.

Induction as knowledge acquisition

One of the externally recruited newcomers received a check list with 12 topics to make sure she covered basic areas, but no follow up was done to ensure that she learned what she was supposed to.

> IN: Have you had to find out what you had to do yourself, what tasks you had?
>
> IP-NC 2: I received a list with 12 things on, as an introduction to what they thought I should be able to

do. And it went pretty well with most of the things. I think it took a week, so it was OK. I went up to them myself, and said that I haven't heard anything about this and that, and how do I do it – give me something, do something, and finally I had ticked off all the things on my list. And so what – nothing happened. No one had given it any further thoughts.

IN: There was no follow up on your check list?

IP-NC 2: No, I have had to ask to do the e-learning courses in our computer room myself.

(Newcomer, DB2)

The corporation provides the branches with e-learning courses about the procedures in different products, but no specific emphasis is put on offering them to the newcomers or completing them. This means that one has not yet participated in any, and that one waited very long to participate, missing some basic knowledge in the beginning. Common to the three new employees that have taken (some of) the e-learning courses is that the benefit has been limited.

IN: I have heard that you have some e-learning courses. Have you taken any of those?

IP-NC 4: The ones at the computer? Yes, I have gone through some of them

IN: How has the benefit been?

IP-NC4: Limited

IN: What are they about?

IP-NC4: Everything from how the system works to how you set up an account, a general store.

> IN: How long time do they take?
>
> IP-NC4: I have spent a few hours, but I haven't even been through all of them. Because some of them required sound on the computer so I couldn't sit at the front end, and there were no free seats at the back, so some of them I haven't taken yet, and I don't think they are so important. I think it is very different from person to person what you get out of them.
>
> IN: Why don't you think they are important – hasn't it been possible to relate them to your work?
>
> IP-NC4: Yes, but, I think they are very basic.
>
> (Newcomer, DB1)

The e-learning programs are described as very basic, old fashioned without any usable examples, and impossible to use when you have no banking vocabulary in advance. The e-learning courses cause a dilemma. They are expected to provide some basic knowledge of procedures and products, and can as such be of invaluable help for newcomers, but at the same time do the courses require a specific vocabulary, which the newcomers do not yet possess in order to gain sufficiently from taking them.

Induction as the combination of knowledge and socialisation

Our interviews show that changes are happening, and one way to understand this difference is to categorize them into changes concerned with practical and visible practices and changes concerned with more subtle and identity related issues. To understand these changes we operate along two analytical dimensions that we for analytic reasons call "practicalities", which can be seen in line with learning as knowledge acquisition and "identicalities", which is in line with learning as participation. The two terms indicate that the individual modify or change their visible practices as well as their identity during and as a result of induction. Changes noted in the organization are also divided into practicalities and identicalities, which in turn suggest that visible practices as well as "identity matters" are changed due to the arrival of a newcomer.

On the personal practicality level, three of the newcomers state that they are adhering to a dress code and dress differently than they did in their previous occupation, despite the fact, that no specific dress code applies. They also note that they have had to acquire certain IT skills as well as professional skills to be able to perform adequately. The personal identicality level becomes evident when one of the newcomers state that she does not question things as much, pointing to the fact that she is becoming more and more socialised into the routines and self-evident truths of the bank.

Another respondent mentions that she is very aware not to become a "banker", deliberately trying to "keep herself" by distancing herself from the profession. Her perception of the profession is somewhat connected to the negative image of a bank employee as being boring, dead serious and unhappy, suggesting that her identity formation is equally affected by becoming socialised into the bank.

Both the personal practicality level and the personal identicality levels are concerned with the transformation of identity, but for analytic reasons we have chosen to keep the two concepts distinct, as the data shows that two kinds of change are in play. The employees experience that their perceptions of themselves and their visible behaviour changes due to their entry in the bank. However, a deeper analysis of the interplay of the two levels requires a more thorough investigation and would include other means of empirical follow-up studies.

On the organizational practicality level, the newcomers have for example brought about altered smoking routines, new ways of counting money, and new places for gifts and merchandise. The latter two are direct results of newcomers questioning the routines and then suggesting better ways of doing things. These changes are very evident and are notes as visible signs of the changes effected by the newcomers.

Also on the organizational identicality level changes are noted, however small and difficult to see. One example of the organizational identicality level is expressed in the following quote by a manager:

> IP-BM 1: I think that it affects them [the older colleagues] positively, because it might cause them to – that if someone with high spirits, just the way they move is faster than many of those who have been sitting her for 30 years – it hopefully cause them, I believe, and that might be naïve, to think that: they should not believe that they are anybody, those youngsters, so we will make an effort (…) I really think that the young people create dynamics in the branch.
>
> (Branch Manager, DB1)

The manager feels he experiences a more dynamic culture and that the pace of service has fastened. As illustrated in the following quote by one of the colleagues, the newcomer's ability to see routines from the outside and question practice are also noticed and valued, but the newcomer's exact contribution in this process is difficult to pinpoint.

> IN: You mentioned earlier, that the newcomers have contributed with knowledge and ideas that have changed routines. Are there other things that have changed due to the newcomers?
>
> IP-CO 2: No, I don't think so. It is always nice to get new impulses (…) I think it is good that someone who has not only been in the bank comes, actually, I think.
>
> IN: Why is that good?
> IP-CO 2: Yes, but often if you sit, people who have only been in the bank, you sit and do the same things the same way over again – in stead of someone from outside comes and say: why don't you do it this way, and then you think, yes, why don't we do it this way?
>
> (Colleague with no formal induction responsibility, DB2)

These changes can be seen as a reconfiguration of practice, and can be described as changes in the "organizational rhythm" (see also Boje, 2006). The concept of "rhythm" connotes the dynamics and pace of everyday practice which is affected and changed in subtle ways upon a newcomer's arrival. The concept of rhythm is related to a music metaphor where the employees all play a different instrument. When a new "instrument" starts to play, the other musicians automatically "tune in" and the tune changes, even though it can be very difficult to track exactly where and how the changes appears (see also Cook & Yanow, 1993). The branches are still performing their core tasks, but the way this is done is reconfigured through new impulses and questions, through new types of employees and new views on things. The old-timers are challenged in their way of thinking and acting, and they are forced to "tune in". Practice changes due to the new line up of musicians, which is made explicit in this case by the perception of more dynamic branches, livelier atmospheres, faster service and a faster pace in general.

An emerging dilemma in induction

As stated above, the competition to attract new customers has forced the branches to select and recruit a different type of employee that presumably can contribute to overcome the conservative image of the bank by applying customer service skills from other professions into the branch. The managers report that newcomers are recruited to bring "smiles and positive attitudes" into the branch, and are expected to contribute to the overall strategy by providing a more lively atmosphere, and thus keep their non-banking attitude. According to one of the branch managers:

> IP-BM 2: I think it has been pleasantly refreshing. You can say that we bankers in one way or another are one track minded. At least the ones who have been in the banks for years. Sometimes we call us the boring and dusty bankers. We sometimes wear blinkers. We are often very black and white, and creativity is not something you relate to that of being a banker. And thus, you can say that with people like XX and YY, that enters and comes as a fresh breeze, has been very positive.

(Branch Manager, DB2)

Also a manager from the second bank is aware of the importance of introducing people with no prior banking experience.

> IP-BM 1: We can easily use a non-bank trained employee to work at the teller. The most important thing for us is that it is a sweet and nice and smiling employee. We must not have too many, though. (…) My best example is a good hairdresser, you know, one who is able to small-talk, look nice, talk nicely – and then we get them cheap. We get a very satisfied employee and it creates satisfied customers.
>
> (Branch Manager, DB1)

One of the surprising findings is little is done to make sure that the newcomers feel obliged to contribute to the organization, and nothing is done to maintain the newcomers' prior skills and knowledge. First of all; the newcomers experience an ill-structured and insufficient induction. Not enough is done to give the newcomers the information and support they need, for example on how to get around the IT systems, where to find the knowledge they need, and about what is expected from them, thus leaving the newcomers with frustration and distress over their presumed lack of skills and competences in relation to performance. Secondly, the induction process is not perceived as an opportunity to "brain drain" the newcomers. The newcomers all have the impression that they are employed because of their prior experiences, and that the branch hopes can benefit from that by integrating their knowledge and skills into the organization. However, the colleagues do not expect to learn anything from the newcomers and they do not change their routines as a consequence of these new colleagues. No formal or informal procedures have been established in order to create knowledge transfer or secure that brain drain from the individual to the organization take place.

However, another issue is relevant. The distinction between bankers and non-bankers is evident and it is noted at all levels in the branches. Subsequently, homogeneity risk disappearing, and the branch might "break in two" if induction processes are not handled adequately. One of the colleagues expresses her concerns the following way:

> IN: What are the key challenges for the bank as you see it?
>
> IP-CO 2: I think that they will be short of employees. I think we will have to recruit more that are not trained bankers (…)
>
> IN: Do you see any advantages in recruiting non-bankers?
>
> IP-CO 2: No, I don't see any advantages
>
> IN: Are there any disadvantages?
>
> IP-CO 2: The disadvantage is that when you get a totally new colleague they don't know anything. If someone comes from another department, she knows something. But it is only a starting phase. The ones I am involved with is not something that requires a longer process with education and the like; you don't need that. It is different if you are to give advice to customers (…) but because you sit at the teller (…) you don't need a longer training.

> IN: Is there anything that is good to have as a prior experience?
>
> IP-CO 2: It is good to have worked with people, and to be smiling. You can handle a lot with a smile.
>
> (Colleague with no formal induction responsibility, DB2)

The same distinction between bankers and non-bankers is noted by the manager as well, but is regarded to be a strength and beneficial to the branch, if, however, the newcomer is capable of maintaining his or her position as an “outsider”.

> IN: Do you distinguish between bankers and non-bankers?
>
> IP-BM 2: No, I would say that we can use one another. It is evident that there is a difference, and it is why it is nice to get a fresh breeze, because it makes us more active, in the sense that these good questions they ask, they are real. They bring the clear sight. The big challenge for us, and which hopefully won’t happen, is to avoid that they slide into our daily life. They must continue to have their fresh view in things and contribute with these things that we want.
>
> (Branch Manager, DB2)

The newcomers are caught between the need to become part of the bank and learn the necessary banking skills in order to perform adequately and to become accepted by the colleagues as part of the branch, but they are not employed to carry out tasks that require banking skills. It is both required that they become insiders to suit the colleagues and that they remain outsiders to be able to continue to bring "newness" into the organization. Of course those two positions are not extremes at each end of a continuum, but some tensions between "bankers" and "non-bankers" are likely to occur.

Discussion and conclusion

We began by asking what makes management and organizational practice change. And whether it makes sense to understand these changes through the lens of learning – or as learning understood in the pragmatic sense. We use learning as a labelling concept as well as an analytical concept for change. Doing so allow us able to describe induction as a situation or practice in which tension between the habitual thinking and acting is disturbed by the newcomer and as such may act as a trigger for learning. So, when we say that we view change as learning, it is in order to understand the underlying dynamics of the relation between doing/thinking differently or same (stay stable, not think/do differently) in the flow of induction practice. An underlying premise is that the process of change is embedded in the organization, the profession, the culture, nation, etc., and that there is also agency (the power to act or not to act) embedded here.

In either case we seek patterns derived from different positions in the organization – the newcomer, the colleague and the manager – but not by indicating any a priori or determining commitments to induction practices. What we want to point out is how there may be tensions represented in the pulls between changes versus stability in the understanding of induction practice as we see these tensions as potential learning triggers. We define change as doing and/or thinking differently, and the question is whether it is possible to open up e.g. the changes in individual practice or of organizational rhythm through the lens of learning? Drawing on our analytical distinction between different dimensions (the practicalities and the identicalities) in the doing/thinking differently, we are able to pinpoint how induction causes tension and potential triggers for learning – individual and organizational.

Some of the implications of our understanding of the reconfiguration process addressed in this case study are based on the hypothesis that induction processes hold a "two-way" learning potential. Induction is viewed as individual learning (process and result) – the individual adapts to the organization on a continuous basis. But we find it equally important to also view induction as a potential trigger for organizational learning, which means that the organization is able to benefit and learn from the skills, knowledge and identity the newcomer brings into the organization. This view also reflects the third position in which both the individual and the organization is taken into account and in which they are mutual constituents and where the methodological answer becomes to analyse induction as a problematic situation rather that to focus upon either individuals' learning or the contextual conditions for learning.

Our interviews show that learning can be understood as individual learning in both epistemological and ontological terms. Basic skills are acquired through e-learning courses, by trial-and-error, and by looking "over the shoulder" of a colleague. Coming to a bank from different work fields, also seem to affect the identity of the newcomer, as they learn the every day life routines. The identity is affected either by positive identification by adhering to informal dress codes, by accepting routines without questioning or just by feeling part of the branch, or by negative identification by actively trying to avoid to become a banker, because of the image associated with it. Learning, thus, is no longer solely a matter of acquiring adequate skills; it is also a matter of learning to become part of the bank. The two aspects of learning cannot be separated in induction practice, which is why we call for a third position – learning as emerging, as growth.

Our preliminary findings also show that recruitment is perceived and used as a way of creating change in the organization. The two branches under study deliberately select and recruit people with special backgrounds in order to change the dynamics of the branch and enhance the competitiveness of the bank. The branch managers recognize the challenges and importance of being able to attract new customers by offering a wide range of personalities in the branch. They also emphasize that they expect the newcomers to contribute actively to this development. The respondents note that changes have occurred due to the arrival of newcomers, but this is primarily on the organizational practicality level, where altered smoking rules, changes in the physical placing of merchandise and new ways of counting money are the most evident examples. However, the reconfiguration of the subtle levels of bank practice seems to be slow and minimal, suggesting that induction might hold a two-way learning potential, but that organizational learning on the identicality level is limited and difficult to achieve.

The reasons for this inertia might lie in the induction process itself. Even though induction practice has changed in order to adapt to the external pressure and challenges (newcomers with no prior bank experience are inducted), induction practising still has to change in order to accommodate for the nature of the newcomers, their specific needs, the needs of the bank and the changes in core bank practice that this new situation causes.

As we draw on learning theoretical frameworks it is obvious that induction is seen as a practice where learning takes place. The question is, however, how, where and for whom? And also how can we understand and map these learning processes? This case study is the beginning of such a mapping, and as we show in this paper, several themes can be deducted from the case, leaving us with some open questions, which all need elaboration.

We hope to have shown that it is important to view processes of learning as more than an issue of knowledge transfer and acquisition. Because newcomers bring more with them to the organization than knowledge, and because they gain more from the organization than knowledge, conceiving learning as equivalent to issues of knowledge is to deflect attention from all the organizational experiences that remain within a non-cognitive field, such as intuition, feelings and emotions. When organizations are understood as arenas of social worlds, socialization involves adjusting to norms, unwritten rules and implicit demands by being part of these social worlds, as well as committing to those norms, rules and demands. It is an active as well as a passive process. The same process holds for the organization adjusting to the newcomer. Following this line of thought, a third position, learning as emerging – or becoming – may hold an analytical potential for the understanding of the relation between change and learning. Besides learning through acquisition and participation, induction contains mutual aspects of identity building and personal development for both newcomer and organization.

By introducing this third understanding of learning as emerging, we argue that being and becoming is equally important to that of knowing in organizations. Additionally we have shown, that we might need to shift focus from learning going one-way (from the organization to the individual) to include a two-way learning perspective, in order to contribute to a more thorough understanding of learning taking place in induction. Induction can be seen as learning, both in relation to becoming an individual constituted by the organization and to becoming an organization constituted by the individuals. Based on our analysis of an induction process, we will answer the question posed in the title: "Learning and knowing – synonymous term?" with a "yes - but…" as induction is both about acquiring new knowledge and about becoming or emerging as a competent organisational member, but no emphasis should be put on either aspect, as they are inseparable in relation to a learning process, where newcomers as well as organizations emerge.

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